A5690-1.1-F

# INTERNATIONAL AIRLINE PASSENGERS ASSOCIATION (IAPA)

## Membership Survey Results - 1984/1985

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## NORTH AMERICAN SURVEY RESULTS

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Published by
International Airline Passengers Association
(Group Publications) Ltd

DALLAS . LONDON . HONG KONG . PANAMA . ROTTERDAM
BERLIN . PORTUGAL

# FOREWORD

This report presents a summary of the data analysis of the 1984 IAPA membership survey. In general, members are high frequency air travellers who make trips for both business and pleasure. They are predominantly male, highly educated, of a professional or business status, and in the middle to high income brackets.

Since the civil aviation industry in the North American continent is markedly different from that in other parts of the world, two questionnaires were compiled; the first was sent to members residing in North America, Canada and Mexico, the second to members in all other parts of the world. The results from the two questionnaires are presented in separate booklets.

Questionnaires were mailed to over 93,000 IAPA members. As of November 1984 10,059 of the North American questionnaires and 9,072 of the international questionnaires had been returned giving an overall response rate of 20%. Approximately 44% of IAPA membership resides in the Americas.

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## ABOUT THE NORTH AMERICAN SURVEY RESPONDENTS

**********

This section of the report presents the basic demographic profile of the 1984 American respondents and their businesses. Where appropriate, comparisons with the previous 1981 and 1979 survey results are made. There were a total of 10,059 respondents to this year's American survey, 9,324 being U.S. residents, and 735 residing in other North American countries (primarily Canada or Mexico).

Throughout this report the 7.3% of respondents who reside outside of the U.S.A. are referred to as "Other N.A. Respondents".

## RESPONDENT DEMOGRAPHICS
**********

### Country of residence
==========

At the time the survey was conducted, 92.7% of the American respondents resided in the United States, 2.4% lived in Canada, 3.2 % resided in Mexico and 1.7% lived elsewhere.

### U.S. Region/city of residence
==========

U.S. respondents reside in the following U.S. regions:

| | | |
|---|---|---|
| East | 25.8% | 32.4% |
| South/South Central | 20.9% | 26.2% |
| North Central | 15.7% | 19.7% |
| West | 17.3% | 21.7% |
| No response | 20.3% | - |
| | 100.0% | 100.0% |

In addition, the following percentages of respondents live in the following U.S. cities, which are the home bases for the five major domestic airlines.

| Home city/airline | Respondents residing in city Percentage/Number |
|---|---|
| Atlanta/Delta | 1.5% / 137 |
| Chicago/United | 3.8% / 355 |
| Dallas/American | 4.9% / 464 |
| Miami/Eastern | 2.0% / 195 |
| St. Louis/TWA | 1.0% / 75 |

Age

The average ages of 1984 U.S. and Other N.A. survey respondents are 53.6 and 48.1 years, respectively. This is somewhat older than the typical 1981 U.S. (50.2) and Other N.A. (44.8) respondents.

AGE

U.S. respondents

| | 1984 | | 1981 | 1979 |
|---|---|---|---|---|
| Under 20 | 0.1% | Under 18 | 0.1% | 0.1% |
| 20 - 24 | 0.5 | 18 - 21 | 0.2 | 0.3 |
| 25 - 29 | 1.9 | 22 - 25 | 1.7 | 1.6 |
| 30 - 34 | 4.8 | 26 - 35 | 13.8 | 11.3 |
| 35 - 39 | 7.7 | 36 - 45 | 22.1 | 19.9 |
| 40 - 44 | 9.7 | 46 - 55 | 26.2 | 28.8 |
| 45 - 49 | 10.7 | 56 - 65 | 23.4 | 25.3 |
| 50 - 54 | 14.3 | OVER 65 | 12.6 | 12.7 |
| 55 - 59 | 14.8 | | | |
| 60 - 64 | 15.3 | | | |
| 65+ | 20.3 | | | |
| Average | 53.6 | Average | 50.2 | 51.1 |

Other N.A. respondents

| | 1984 | | 1981 | 1979 |
|---|---|---|---|---|
| Under 20 | 0.0% | Under 18 | 0.0% | 0.0% |
| 20 - 24 | 1.2 | 18 - 21 | 0.6 | 0.4 |
| 25 - 29 | 3.3 | 22 - 25 | 2.3 | 1.4 |
| 30 - 34 | 8.7 | 26 - 35 | 22.2 | 19.0 |
| 35 - 39 | 13.5 | 36 - 45 | 30.8 | 35.1 |
| 40 - 44 | 13.9 | 46 - 55 | 26.6 | 27.9 |
| 45 - 49 | 14.2 | 56 - 65 | 13.8 | 13.0 |
| 50 - 54 | 15.4 | Over 65 | 3.8 | 3.1 |
| 55 - 59 | 15.1 | | | |
| 60 - 64 | 8.9 | | | |
| 65+ | 5.7 | | | |
| Average | 48.1 | Average | 44.8 | not available |

Sex
===

As has been the case in previous surveys, the vast majority of this year's American respondents are male.

SEX

| | U.S. respondents | | | Other N.A. Respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| Male | 90.1 | 92.0 | 90.2 | 94.7 | 96.0 | 97.1 |
| Female | 9.9 | 8.0 | 9.8 | 5.3 | 4.0 | 2.9 |

Marital status
==========

Slightly more than 80% of the 1984 survey respondents are married at the present time.

MARITAL STATUS 1984

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Married | 80.3% | 84.6% |
| Unmarried | 19.7% | 15.4% |

## Education

As in previous years, 1984 American respondents are well educated; almost all have at least some college background and about half have done postgraduate work.

EDUCATION

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| 1 - 6 years | 0.3% | 0.1 | 0.2 | 0.7% | 0.4 | 0.3 |
| 7 - 9 years | 0.6 | 0.5 | 0.7 | 0.7 | 0.9 | 2.2 |
| 10 - 12 years | 7.5 | 6.9 | 8.8 | 8.3 | 8.7 | 12.4 |
| 1 - 2 years college | 14.6 | 14.8 | 15.7 | 8.0 | 12.1 | 11.8 |
| 3 - 4 years college | 31.6 | 31.2 | 28.9 | 22.4 | 28.8 | 27.3 |
| Postgraduate work | 45.3 | 46.5 | 45.8 | 59.8 | 49.2 | 46.1 |

## Occupation

As in 1981 and 1979, most 1984 survey respondents work as executives, managers or professionals.

OCCUPATION

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| Executive/manager | 42.9 | 42.9 | 36.5 | 54.6 | 56.6 | 55.5 |
| Professional | 20.7 | 19.7 | 33.7 | 19.1 | 16.8 | 29.9 |
| Teacher/professor | 2.9 | 3.2 | ---- | 1.9 | 2.2 | ---- |
| Sales (other than retail) | 6.8 | 9.0 | 12.7 | 2.2 | 3.4 | 6.8 |
| Technical | 3.0 | 3.9 | ---- | 2.7 | 2.7 | ---- |
| Craftsman | 0.3 | 0.4 | 1.1 | 0.4 | 0.1 | 0.9 |
| Clerical | 0.6 | 0.5 | 0.7 | 0.1 | 0.5 | 0.4 |
| Government/military | 2.8 | 3.6 | ---- | 2.9 | 4.7 | ---- |
| Retired | 9.5 | 6.4 | 7.5 | 3.4 | 2.3 | 2.1 |
| Self-employed | 7.5 | 9.2 | ---- | 8.3 | 10.2 | ---- |
| Student | 0.2 | 0.4 | ---- | 1.0 | 0.4 | ---- |
| Homemaker | 0.9 | 0.5 | ---- | 0.5 | 0.2 | ---- |
| Other | 2.2 | 0.5 | 7.8 | 2.9 | 0.0 | 4.4 |

## Income

The average annual household income for 1984 U.S. respondents is $82,400, as compared with $71,300 in 1981 and $54,100 in 1979. Other N.A. respondents report an average household income of $80,800, versus a similar amount, $82,300 in 1981.

### ANNUAL HOUSEHOLD INCOME

#### U.S. Respondents

| | 1984 | | 1981 | 1979 |
|---|---|---|---|---|
| Under $20,000 | 3.1% | Under $20,000 | 3.6% | 8.3% |
| 20,000 - 34,999 | 9.1 | 20,000 - 35,000 | 13.7 | 23.9 |
| 35,000 - 49,999 | 17.0 | 35,001 - 50,000 | 25.0 | 26.0 |
| 50,000 - 64,999 | 21.1 | 50,001 - 75,000 | 26.0 | 21.4 |
| 65,000 - 79,999 | 13.1 | 75,001 - 100,000 | 14.8 | 8.9 |
| 80,000 - 99,999 | 11.3 | 100,001 - 150,000 | 8.8 | 11.6 |
| 100,000 - 149,999 | 13.8 | Over 150,000 | 8.1 | --- |
| 150,000 + | 11.6 | | | |
| Average | $82,400 | Average | $71,300 | $54,100 |
| Percentage change since preceding survey | + 15.5% | Percentage change since preceding survey | + 31.0% | |

#### Other N.A. respondents

| | 1984 | | 1981 | 1979 |
|---|---|---|---|---|
| Under $20,000 | 4.4% | Under $20,000 | 1.8% | |
| 20,000 - 34,999 | 10.0 | 20,000 - 35,000 | 11.2 | |
| 35,000 - 49,999 | 15.7 | 35,001 - 50,000 | 20.5 | |
| 50,000 - 64,999 | 20.4 | 50,001 - 75,000 | 26.4 | |
| 65,000 - 79,999 | 13.2 | 75,001 - 100,000 | 15.7 | |
| 80,000 - 99,999 | 11.8 | 100,001 - 150,000 | 11.8 | |
| 100,000 - 149,999 | 13.7 | Over 150,000 | 12.6 | |
| 150,000+ | 10.8 | | | |
| Average | $80,800 | Average | $82,300 | not available. |
| Percentage change since preceding survey | - 2.7% | | | |

The number of American respondent households with 2+ persons contributing to income has been steadily increasing over the past five years.

NUMBER OF FAMILY MEMBERS CONTRIBUTING TO HOUSEHOLD INCOME

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| 1 person | 62.9% | 69.5% | 73.9% | 64.8% | 74.4% | 77.5% |
| 2 persons | 36.2 | 29.6 | 25.3 | 30.2 | 23.1 | 19.6 |
| 3 persons | 0.9 | 0.9 | 0.8 | 5.0 | 2.5 | 3.0 |

## PROFILE OF RESPONDENTS' BUSINESSES

1984 American survey participants work in the following industries:

CATEGORY OF BUSINESS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Manufacturing | 20.1% | 22.1% |
| Professions | 17.9 | 10.9 |
| Business services | 7.1 | 5.6 |
| Government | 5.8 | 5.0 |
| Wholesale trade | 5.4 | 4.5 |
| Communications | 5.1 | 3.3 |
| Other services | 3.8 | 3.9 |
| Finance | 3.2 | 3.9 |
| Transportation | 3.0 | 2.8 |
| Mining/oil/gas | 2.9 | 5.8 |
| Retail trade | 2.9 | 2.3 |
| Construction | 2.7 | 7.8 |
| Insurance | 2.3 | 1.4 |
| Real estate | 2.1 | 2.3 |
| Agriculture | 1.9 | 4.2 |
| Other | 14.1 | 14.5 |

## Size of respondents' firms

The number of American survey respondents employed in relatively small firms (under 100 employees) has increased somewhat since 1981, with over half currently reporting that their company falls in this category.

SIZE OF RESPONDENTS' FIRM

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| 1 - 99 | 55.4% | 50.3% | 50.0% | 44.5% |
| 100 - 249 | 10.4 | 10.9 | 10.4 | 13.4 |
| 250 - 499 | 6.9 | 8.0 | 10.5 | 9.8 |
| 500 - 999 | 5.9 | 6.6 | 6.8 | 9.1 |
| 1,000 - 4,999 | 9.5 | 10.5 | 12.3 | 11.2 |
| 5,000+ | 12.0 | 13.8 | 10.1 | 12.0 |

**********

NORTH AMERICAN AIRLINE EXPERIENCES

**********

## DOMESTIC AIRLINES FLOWN DURING PAST TWO YEARS

**********

From a specified list of U.S. and international airlines, respondents indicated on which ones they had flown during the past two years. Among U.S. respondents, there has been a significant (at least 5%) decline in reported usage since 1981 on the following American carriers:

* American
* Delta
* United
* TWA
* U.S. Air
* Continental
* Western
* Frontier
* Air Cal

The results show American and Delta to have declined in terms of usage from their 1981 positions as the number 1 and number 2 carriers to the number 2 and number 3 carriers, respectively. Eastern is currently the domestic airline with the largest reported U.S. usage.

In all, this year's top five domestic carriers in terms of reported U.S. usage are:

* Eastern (72.3%)
* American (70.9%)
* Delta (70.4%)
* United (69.4%)
* TWA (57.0%)

Only one domestic airline, New York Air (from among those evaluated in 1984 and 1981), shows a significant increase (at least 5%) in U.S. passenger usage since 1981.

Other N.A. respondents indicate significant decreases (at least 5%) in their use of the following U.S. airlines since 1981:

* American
* Delta
* United
* U.S. Air
* Western

In current findings, the top five domestic carriers flown by Other N.A. residents are:

* Eastern (70.1%)
* American (65.4%)
* Pan Am (59.1%)
* United (44.2%)
* Delta (43.8%)

Both Pan Am and U.S. Air have been flown significantly (at least 5%) more frequently by Other N.A. respondents in 1984 findings than in 1981 findings. Listed below is a comparison of domestic airline usage by 1984 U.S. respondents' area of residence. (See table 1 for details on domestic airlines flown.)

DOMESTIC AIRLINES MOST COMMONLY FLOWN BY 1984 U.S. RESPONDENTS IN THE PAST TWO YEARS BY AREA OF RESIDENCE.
(All airlines flown by at least 50% of the respondents)

| East | South/ South Central | West | North Central |
|---|---|---|---|
| Eastern (83.9%) | Delta (86.4%) | United (82.4%) | United (81.1%) |
| American(74.2%) | Eastern (80.1%) | American (70.5%) | Delta (73.8%) |
| United (72.7%) | American (68.1%) | PSA (62.8%) | American (73.5%) |
| Delta (69.8%) | United (50.3%) | Western (61.2%) | TWA (66.3%) |
| TWA (68.3%) | | TWA (58.8%) | Eastern (64.9%) |
| U.S. Air (62.2%) | | Delta (54.3%) | Republic (60.6%) |
| Pan Am (51.1%) | | Eastern (53.8%) | Northwest (58.1%) |
| | | Republic (50.5%) | |

Table 1

DOMESTIC AIRLINES FLOWN DURING THE PAST 2 YEARS

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | 1984 | Rank | 1981 | Rank | 1984 | Rank | 1979 | Rank |
| Eastern | 72.3% | 1 | 77.0% | 3 | 70.1% | 1 | 74.5% | 2 |
| American | *70.9 | 2 | 82.2 | 1 | *65.4 | 2 | 79.7 | 1 |
| Delta | *70.4 | 3 | 77.4 | 2 | *43.8 | 5 | 54.1 | 3 |
| United | *69.4 | 4 | 74.7 | 4 | *44.2 | 4 | 54.0 | 4 |
| TWA | *57.0 | 5 | 64.0 | 5 | 31.6 | -- | 32.9 | -- |
| Republic | 44.0 | -- | 44.5 | -- | 27.1 | -- | 29.1 | -- |
| Pan Am | 44.0 | -- | 42.8 | -- | (59.1) | 3 | 49.9 | 5 |
| U.S. Air | *41.7 | -- | 48.3 | -- | *24.2 | -- | 32.9 | -- |
| Northwest | 38.5 | -- | 40.6 | -- | 20.8 | -- | 23.4 | -- |
| Continental | *36.3 | -- | 48.3 | -- | 42.8 | -- | 38.4 | -- |
| Piedmont | 32.9 | -- | 29.0 | -- | 12.5 | -- | 9.6 | -- |
| Western | *27.8 | -- | 33.4 | -- | *38.5 | -- | 48.3 | -- |
| PSA | 25.8 | -- | 28.0 | -- | 14.7 | -- | 18.6 | -- |
| Frontier | *24.3 | -- | 30.2 | -- | 12.5 | -- | 16.8 | -- |
| Ozark | 21.2 | -- | 25.3 | -- | 8.2 | -- | 11.2 | -- |
| New York Air | (19.0) | -- | 8.9 | -- | (8.4) | -- | 1.8 | -- |
| Southwest | 18.8 | -- | 17.0 | -- | 11.1 | -- | 8.8 | -- |
| Air Cal | *15.6 | -- | 21.7 | -- | 8.7 | -- | 11.1 | -- |
| Air Florida | 15.1 | -- | 19.0 | -- | 10.9 | -- | 13.1 | -- |
| People Express | 15.1 | -- | -- | -- | 6.2 | -- | -- | -- |
| Aloha | 12.2 | -- | 10.8 | -- | 7.6 | -- | 7.1 | -- |
| Hawaiian | 10.3 | -- | 8.7 | -- | 5.3 | -- | 4.9 | -- |
| Midway | 8.7 | -- | 6.7 | -- | 0.7 | -- | 0.7 | -- |
| Alaska | 8.3 | -- | 6.1 | -- | 2.1 | -- | 2.6 | -- |
| Muse Air | 7.1 | -- | -- | -- | 2.2 | -- | -- | -- |
| Capitol | 5.5 | -- | -- | -- | 3.6 | -- | -- | -- |
| World | 4.2 | -- | -- | -- | 1.8 | -- | -- | -- |
| America West | 3.5 | -- | -- | -- | 1.2 | -- | -- | -- |
| Mid Pacific | 2.8 | -- | -- | -- | 2.1 | -- | -- | -- |
| Air 1 | 2.6 | -- | -- | -- | 0.6 | -- | -- | -- |
| Regent Air | 0.6 | -- | -- | -- | 0.8 | -- | -- | -- |
| Other | 12.4 | -- | -- | -- | 6.9 | -- | -- | -- |

( ) = At least 5.0% increase in reported usage since 1981.

* = At least 5.0% decrease in reported usage since 1981.

## IN-FLIGHT SERVICE
**********

1984 American survey respondents' opinions as to which airlines provide the best and worst in-flight service may vary according to their country, area or city of residence. American Airlines is consistently rated as one of the best for in-flight service, while Eastern is more consistently named as having the poorest in-flight service as compared with other domestic carriers.

Of the five largest domestic carriers, all receive relatively frequent mentions as providing the best in-flight service in their home city.

DOMESTIC AIRLINES WITH THE BEST IN-FLIGHT SERVICE

(Includes airlines with at least 5.0% U.S. total mentions)

| | Area of residence | | | | | |
|---|---|---|---|---|---|---|
| | Total | East | South/ South Central | North Central | West | Canada/ Mexico |
| American [1] | (48.1%) | (54.3%) | (43.8%) | (46.3%) | (47.8%) | (54.4%) |
| Delta [2] | (44.2) | (39.4) | (67.1) | (42.8) | (28.5) | (25.0) |
| United [3] | (37.6) | (44.5) | 19.7 | (44.2) | (46.2) | (22.9) |
| TWA [4] | (22.3) | (30.1) | 11.0 | (26.1) | (24.5) | 10.5 |
| Eastern [5] | 16.2 | 18.5 | (22.5) | 11.7 | 8.6 | (26.7) |
| Pan Am | 9.9 | 11.8 | 12.2 | 4.4 | 9.9 | (21.6) |
| Northwest | 7.9 | 7.2 | 6.0 | 15.2 | 4.9 | 7.8 |
| Continental | 6.9 | 3.9 | 9.0 | 6.7 | 10.1 | 12.0 |
| Republic | 5.9 | 3.1 | 5.0 | 12.7 | 5.7 | 4.9 |
| Piedmont | 5.7 | 6.0 | 8.0 | 7.5 | 1.4 | 2.4 |

1. American 61.4% in Dallas
2. Delta 87.2% in Atlanta
3. United 54.8% in Chicago
4. TWA 68.3% in St. Louis
5. Eastern 35.8% in Miami

( ) = 20% and greater.

DOMESTIC AIRLINES WITH THE WORST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% U.S. total mentions)

| | | Area of residence | | | | |
|---|---|---|---|---|---|---|
| | Total | East | South/ South Central | North Central | West | Canada Mexico |
| Eastern | (34.2%) | (41.8%) | (38.3%) | (28.6%) | (22.8%) | (26.8%) |
| U.S. Air | (17.8) | (28.5) | (12.2) | (22.3) | 6.7 | (11.7) |
| Pan Am | (14.0) | (15.5) | (15.1) | 7.6 | (16.0) | (31.2) |
| Republic | (13.8) | 6.5 | (16.0) | (18.8) | (19.5) | 7.5 |
| TWA | (10.3) | (11.2) | 7.0 | (13.9) | (11.2) | 6.3 |
| Northwest | (10.2) | (10.2) | 5.8 | (16.7) | (10.4) | 4.4 |
| United | (10.0) | 6.6 | 6.2 | (13.6) | (17.4) | 5.6 |
| People Express | 7.1 | (16.2) | 4.8 | 3.1 | 1.3 | 2.3 |
| Continental | 7.0 | 4.1 | 8.8 | 5.3 | (11.3) | (14.5) |
| American | 6.9 | 6.2 | 9.2 | 6.3 | 5.4 | 6.8 |
| Piedmont | 6.3 | 8.5 | 8.5 | 6.3 | 1.7 | 1.9 |
| Delta | 5.7 | 4.1 | 6.8 | 7.3 | 5.0 | 3.3 |
| Ozark | 5.3 | 2.6 | 6.2 | (13.2) | 2.9 | 3.0 |
| Western | 5.0 | 1.9 | 2.5 | 3.7 | (12.9) | 6.5 |
| PSA | - | - | - | - | (12.7) | - |

( ) = 10% and greater

## GROUND SERVICE
**********

All American respondents agree that American Airlines is the U.S. carrier with the best ground service. Other N.A. residents feel that Delta almost equals American in this respect. Again, the major U.S. carriers score notably better than average in their home cities.

Eastern is widely regarded as the domestic airline with the worst ground service. Other N.A. residents cite Pan Am as being poorer than Eastern for the ground service it offers.

DOMESTIC AIRLINES WITH THE BEST GROUND SERVICE
(Includes all airlines with at least 5% total mentions)

| | Area of residence | | | | | |
|---|---|---|---|---|---|---|
| | Total | East | South/ South Central | North Central | West | Canada/ Mexico |
| American [1] | (40.2%) | (45.1%) | (35.5%) | (38.8%) | (40.7%) | (52.9%) |
| Delta [2] | (38.2) | (31.7) | (61.6) | (35.5) | (22.7) | 19.4 |
| United [3] | (29.0) | (37.6) | 13.1 | (35.7) | (40.3) | 15.2 |
| TWA [4] | 17.4 | (23.3) | 8.5 | (21.0) | 18.8 | 8.7 |
| Eastern [5] | 14.1 | 16.3 | 19.9 | 9.7 | 7.5 | (23.9) |
| Pan Am | 7.2 | 9.4 | 8.2 | 2.3 | 7.4 | 15.8 |

1 American 55.7% in Dallas ( ) = 20% and greater
2 Delta 83.6% in Atlanta
3 United 46.6% in Chicago
4 TWA 45.8% in St. Louis
5 Eastern 35.7% in Miami

DOMESTIC AIRLINES WITH THE WORST GROUND SERVICE
(Includes all airlines with at least 5.0% total U.S. mentions)

| | Total | Area of residence | | | | |
|---|---|---|---|---|---|---|
| | | East | South South Central | North Central | West | Canada/ Mexico |
| Eastern | (28.7%) | (34.6%) | (35.1%) | (20.2%) | (16.2%) | (23.0%) |
| U.S. Air | (14.7) | (23.9) | 9.3 | (17.4) | 5.0 | 7.3 |
| Pan Am | (12.7) | (15.1) | (13.5) | 5.8 | (14.1) | (31.5) |
| Republic | (12.4) | 6.8 | (13.6) | (17.3) | (16.8) | 7.9 |
| United | (10.8) | 7.1 | 6.5 | (14.9) | (17.8) | 3.9 |
| TWA | (10.8) | (11.8) | 7.0 | (14.5) | (11.5) | 8.1 |
| Northwest | 9.0 | 8.9 | 4.9 | (17.4) | 7.2 | 5.3 |
| American | 7.4 | 4.6 | (10.9) | 6.7 | 7.0 | 4.5 |
| Continental | 6.7 | 3.8 | 8.3 | 5.1 | (11.7) | (12.4) |
| People Express | 6.6 | (14.6) | 7.8 | 2.9 | 1.2 | 2.2 |
| Piedmont | 5.5 | 7.9 | 7.3 | 4.2 | 1.6 | 2.0 |
| Southwest | - | - | (10.7) | - | - | - |
| Ozark | - | - | - | (12.8) | - | - |
| Western | - | - | - | - | 1.4 | - |

( ) = 10% and greater

## MOST PREFERRED U.S. AIRLINES

**********

Respondents were asked to name up to four U.S. carriers on which they most prefer to fly. In the U.S., three U.S. airlines are most preferred - American, Delta and United. Among Other N.A. residents, American Airlines stands out alone as the first choice.

### MOST PREFERRED DOMESTIC AIRLINES

(Up to 4 choices)
(Includes airlines with at least 5.0% U.S. total mentions)

| | | Area of residence | | | | |
|---|---|---|---|---|---|---|
| | Total | East | South Central | North Central | West | Mexico |
| American [1] | (49.4%) | (55.8%) | (44.5%) | (47.2%) | (50.5%) | (56.6%) |
| Delta [2] | (43.2) | (39.2) | (66.8) | (41.6) | (27.8) | (26.7) |
| United [3] | (41.7) | (49.6) | (23.3) | (48.9) | (50.0) | (24.2) |
| TWA [4] | (24.5) | (33.5) | 11.8 | (29.0) | (26.3) | 11.8 |
| Eastern [5] | 16.7 | 19.4 | (24.0) | 12.2 | 7.8 | (27.8) |
| Pan Am | 10.3 | 12.0 | 12.2 | 3.8 | 11.6 | (22.6) |
| Northwest | 7.4 | 6.3 | 5.8 | 14.2 | 4.6 | 7.9 |
| Continental | 6.1 | 3.3 | 8.6 | 5.4 | 9.0 | 9.0 |

( ) = 20% and greater

1 American 61.2% in Dallas
2 Delta 85.5% in Atlanta
3 United 58.6% in Chicago
4 TWA 72.3% in St. Louis
5 Eastern 39.1% in Miami
6 Western Airlines 13.5%
7 Western Airlines 15.9%

Respondents were also asked to designate one U.S. carrier as their most preferred. As in 1981 and 1979, American is the top choice in the U.S. with Delta and United being close second and third choices. Delta has been gaining in U.S. popularity since 1979, while Continental has lost ground during this same time.

SINGLE MOST PREFERRED DOMESTIC AIRLINE
(Top ten)

| U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | | 1984 | 1981 | 1979 |
| American [1] | 24.9% | 31.3% | 23.9% | American | 31.8% | 37.8% | 23.6% |
| Delta [2] | 20.6 | 18.0 | 13.1 | Pan Am | 12.0 | 3.0 | 5.2 |
| United [3] | 19.8 | 18.7 | 22.2 | Eastern | 11.8 | 8.7 | 14.0 |
| TWA [4] | 9.5 | 9.2 | 11.1 | Delta | 9.8 | 12.6 | 13.2 |
| Eastern [5] | 5.8 | 4.3 | 3.8 | United | 8.4 | 11.4 | 15.2 |
| Pan Am | 4.6 | 1.3 | 1.4 | Western | 5.2 | 5.0 | 2.5 |
| Northwest | 2.2 | 1.3 | 0.9 | TWA | 4.2 | 4.1 | 7.8 |
| Continental | 1.5 | 6.1 | 9.9 | Continental | 3.4 | 5.3 | 5.0 |
| Piedmont | 1.4 | --- | --- | Northwest | 2.8 | --- | --- |
| Republic | 1.1 | --- | --- | Republic | 1.2 | --- | --- |

1 American 43.3% in Dallas
2 Delta 68.0% in Atlanta
3 United 36.5% in Chicago
4 TWA 60.3% in St. Louis
5 Eastern 24.5% in Miami

By U.S. region, the choices for most preferred airline are as follows:

SINGLE MOST PREFERRED U.S. AIRLINE
(With 10% or more mentions)

| | | U.S. Area of residence | | | |
|---|---|---|---|---|---|
| | Total | East | South/ South Central [1] | North Central [2] | West |
| American | 24.9% | 29.5% | 21.4% | 20.2% | 25.7% |
| Delta | 20.6 | 13.9 | 41.0 | 16.7 | 9.6 |
| United | 19.8 | 23.4 | 4.8 | 25.4 | 28.7 |
| TWA | 9.5 | 12.4 | 2.9 | 13.3 | 11.5 |

1 Eastern - 10.1%
2 Northwest - 16.1%

## DOMESTIC AIRLINES THAT WOULD BE AVOIDED

As in 1981 and 1979, Eastern is the airline that U.S. respondents single out as the one they would be most likely to avoid. Other N.A. respondents would be most likely to avoid both Pan Am and Eastern.

DOMESTIC AIRLINES TO BE AVOIDED
(Top ten)

| U.S. respondents | 1984[1] | 1981[2] | 1979[2] | Other N.A. respondents | 1984[1] | 1981[2] | 1979[2] |
|---|---|---|---|---|---|---|---|
| Eastern | 27.8% | 18.9% | 21.4% | Pan Am | 21.9% | 14.5% | 14.8% |
| U.S. Air | 16.4 | 11.2 | 12.0 | Eastern | 21.6 | 13.1 | 16.7 |
| Continental | 14.4 | ---- | ---- | Continental | 14.0 | ---- | ---- |
| Republic | 13.6 | 5.5 | 6.7 | U.S. Air | 10.3 | 10.4 | 11.0 |
| Pan Am | 12.4 | 8.6 | 6.2 | Texas Int'l | 10.1 | 8.1 | 3.1 |
| People Express | 11.1 | --- | --- | Republic | 9.8 | 4.7 | 4.8 |
| Northwest | 9.2 | 5.1 | 7.0 | Air Florida | 7.4 | --- | --- |
| TWA | 8.0 | 4.7 | 4.5 | TWA | 6.1 | --- | ---- |
| Piedmont | 7.9 | --- | --- | People Express | 5.9 | --- | --- |
| Ozark | 7.3 | --- | --- | American | 5.4 | 3.8 | 7.1 |

1 Multiple responses
2 One response only

By U.S. area of residence, we find the following:

DOMESTIC AIRLINES TO BE AVOIDED
(Top ten)

| | U.S. AREA OF RESIDENCE | | | | |
|---|---|---|---|---|---|
| | Total | East | South/ South Central [1] | North Central | West [2] |
| Eastern | (27.8%) | (32.5%) | (31.4%) | (26.0%) | (18.3%) |
| U.S. Air | (16.4) | (26.0) | (11.0) | (21.3) | 6.9 |
| Continental | (14.4) | (10.7) | (14.4) | (15.0) | (20.8) |
| Republic | (13.6) | 8.9 | (14.4) | (16.5) | (19.3) |
| Pan Am | (12.4) | (12.7) | (12.4) | 7.8 | (15.3) |
| People Express | (11.1) | (20.5) | 9.5 | 6.6 | 5.0 |
| Northwest | 9.2 | 8.7 | 5.4 | (12.7) | (10.8) |
| TWA | 8.0 | 8.2 | 7.9 | 9.5 | 8.2 |
| Piedmont | 7.9 | 8.8 | 9.2 | 9.3 | 5.1 |
| Ozark | 7.3 | 5.2 | 7.7 | (13.0) | 6.4 |

( ) = 10% and greater

1 Air Florida 10.1%
2 United 11.3%

**********

# INTERNATIONAL AIRLINE EXPERIENCES

**********

## INTERNATIONAL AIRLINES FLOWN DURING PAST TWO YEARS

U.S. respondents' reported usage of international carriers has remained highly consistent since 1981. Only one airline - Air Canada - shows a significant (at least 5%) decline in usage and no carrier has had a major increase in usage during this time. The five international airlines flown most often among U.S. respondents are as follows:

* British Airways (38.7%)
* Air Canada (27.3%)
* Lufthansa (25.2%)
* Air France (21.2%)
* KLM (19.0%)

Other N.A. respondents report a significant (at least 5%) decrease in their usage of the following international carriers since 1981.

* British Airways
* Air Canada
* Air France
* Canadian Pacific

No international airline shows significantly increased usage by other N.A. respondents since 1981.

Due to the decline in Air Canada's passenger use, it has fallen from a first place rank in 1981 to third place this year among other N.A. respondents. In all, the following are the five most commonly flown international carriers among this year's other N.A. survey participants:

* Mexicana (47.1%)
* Aeromexico (44.6%)
* Air Canada (41.4%)
* British Airways (40.3%)
* Air France (35.4%)

The international airlines most frequently flown by 1984 respondents are shown in table 2.

Table 2

INTERNATIONAL AIRLINES FLOWN DURING THE PAST 2 YEARS

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | 1984 | Rank | 1981 | Rank | 1984 | Rank | 1979 | Rank |
| British Airways | 38.7% | 1 | 39.8% | 1 | *40.3% | 4 | 46.0% | 4 |
| Air Canada | *27.3 | 2 | 33.7 | 2 | *41.4 | 3 | 52.1 | 1 |
| Lufthansa | 25.2 | 3 | 24.8 | 3 | 33.0 | -- | 32.8 | -- |
| Air France | 21.2 | 4 | 23.9 | 4 | *35.4 | 5 | 40.8 | -- |
| KLM | 19.0 | 5 | 19.5 | -- | 29.4 | -- | 32.8 | -- |
| Swissair | 18.7 | -- | 19.7 | 5 | 25.1 | -- | 22.7 | -- |
| JAL | 14.5 | -- | 14.8 | -- | 17.0 | -- | 17.8 | -- |
| Alitalia | 13.4 | -- | 14.1 | -- | 18.8 | -- | 18.7 | -- |
| Aeromexico | 12.8 | -- | 15.7 | -- | 44.6 | 2 | 47.1 | 2 |
| Mexicana | 12.7 | -- | 13.9 | -- | 47.1 | 1 | 46.3 | 3 |
| SAS | 12.4 | -- | 12.8 | -- | 12.4 | __ | 13.7 | -- |
| Singapore Airlines | 12.0 | -- | 9.7 | -- | 11.8 | -- | 9.6 | -- |
| British Caledonian | 10.7 | -- | 8.7 | -- | 12.0 | -- | 9.3 | -- |
| Cathay Pacific | 9.8 | -- | 8.0 | -- | 10.6 | -- | 9.1 | -- |
| China Airlines | 8.4 | -- | 7.3 | -- | 5.6 | -- | 5.6 | -- |
| Iberia | 8.3 | -- | 8.2 | -- | 23.4 | -- | 21.5 | -- |
| Canadian Pacific | 7.1 | -- | 8.7 | -- | *30.4 | -- | 41.1 | 5 |
| Qantas | 6.9 | -- | 6.5 | -- | 5.8 | -- | 6.1 | -- |
| Sabena | 6.7 | -- | 6.1 | -- | 6.8 | -- | 8.2 | -- |
| Varig | 6.5 | -- | 7.2 | -- | 14.5 | -- | 11.7 | -- |
| Thai Airways Int'l | 6.0 | -- | 4.7 | -- | 7.2 | -- | 6.0 | -- |
| Air New Zealand | 5.8 | -- | 5.3 | -- | 3.8 | -- | 4.3 | -- |
| BWIA Int'l | 5.3 | -- | 5.2 | -- | 6.0 | -- | 6.2 | -- |

* = At least 5% decrease since 1981.

INTERNATIONAL AIRLINES FLOWN

Table 2 (continued)

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | 1984 | Rank | 1981 | Rank | 1984 | Rank | 1979 | Rank |
| Aer Lingus | 5.3% | -- | 4.8% | -- | 3.2% | -- | 2.3% | -- |
| Air Jamaica | 5.2 | -- | 4.8 | -- | 4.2 | -- | 3.9 | -- |
| El Al Israel Airlines | 5.1 | -- | 5.9 | -- | 4.9 | -- | 5.3 | -- |
| Avianca | 4.9 | -- | 6.0 | -- | 11.3 | -- | 10.0 | -- |
| Olympic Airways | 4.8 | -- | 4.6 | -- | 8.2 | -- | 6.4 | -- |
| Philippine Airlines | 4.8 | -- | 4.9 | -- | 5.0 | -- | 5.0 | -- |
| Air India | 4.1 | -- | 3.8 | -- | 5.8 | -- | 4.0 | -- |
| South African Airways | 3.8 | -- | 3.1 | -- | 2.5 | -- | 2.7 | -- |
| Egyptair | 3.5 | -- | 3.4 | -- | 4.0 | -- | 3.1 | -- |
| Ansett Airlines | 3.3 | -- | 3.6 | -- | 3.1 | -- | 2.4 | -- |
| Finnair | 3.2 | -- | 3.1 | -- | 2.6 | -- | 4.0 | -- |
| Aerolineas Argentinas | 3.1 | -- | 4.0 | -- | 10.3 | -- | 8.7 | -- |
| Viasa | 3.0 | -- | 4.6 | -- | 8.4 | -- | 9.0 | -- |
| Saudi Arabian Airlines | 2.9 | -- | 2.8 | -- | 4.2 | -- | 3.8 | -- |
| TAP | 2.9 | -- | 2.8 | -- | 2.6 | -- | 3.3 | -- |
| Malaysian Airline System | 2.8 | -- | 2.4 | -- | 4.5 | -- | 3.6 | -- |
| UTA French Airlines | 2.7 | -- | 3.1 | -- | 3.2 | -- | 3.5 | -- |
| Garuda Indonesian Airways | 2.7 | -- | 2.2 | -- | 2.9 | -- | 3.0 | -- |
| Gulf Air | 2.2 | -- | 1.9 | -- | 3.8 | -- | 3.3 | -- |

INTERNATIONAL AIRLINES FLOWN

Table 2 (continued)

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | 1984 | Rank | 1981 | Rank | 1984 | Rank | 1979 | Rank |
| Aeroflot | 2.2% | -- | 2.1% | -- | 2.1% | -- | 3.1% | -- |
| Alia | 2.0 | -- | 1.7 | -- | 2.5 | -- | 1.5 | -- |
| British Midland | 2.0 | -- | 1.2 | -- | 3.1 | -- | 1.2 | -- |
| Caribbean Airways | 2.0 | -- | 2.4 | -- | 0.8 | -- | 1.6 | -- |
| Kenya Airways | 1.7 | -- | 1.5 | -- | 1.1 | -- | 1.2 | -- |
| Pakistan Int'l | 1.5 | -- | 1.3 | -- | 1.7 | -- | 2.5 | -- |
| JAT | 1.5 | -- | 1.4 | -- | 1.3 | -- | 1.3 | -- |
| Kuwait Airways | 1.4 | -- | 1.0 | -- | 1.5 | -- | 1.9 | -- |
| Dan Air | 1.3 | -- | 0.9 | -- | 1.5 | -- | 1.2 | -- |
| Royal Air Maroc | 1.3 | -- | 1.3 | -- | 1.5 | -- | 2.2 | -- |
| Air Afrique | 1.3 | -- | 1.7 | -- | 1.9 | -- | 1.9 | -- |
| Nigeria Airways | 1.1 | -- | 1.2 | -- | 1.5 | -- | 0.9 | -- |
| Middle East Airlines | 1.1 | -- | -- | -- | 2.1 | -- | -- | -- |
| Britannia Airways | 1.0 | -- | 0.8 | -- | 1.1 | -- | 1.1 | -- |
| Air Lanka | 1.0 | -- | -- | -- | 1.7 | -- | -- | -- |
| Malev | 1.0 | -- | 0.7 | -- | 0.8 | -- | 1.4 | -- |
| Air Algerie | 0.8 | -- | 0.8 | -- | 1.4 | -- | 0.8 | -- |
| LOT | 0.8 | -- | 1.2 | -- | 0.7 | -- | 1.4 | -- |
| Ethiopian Airlines | 0.8 | -- | 0.7 | -- | 0.6 | -- | 0.8 | -- |
| THY | 0.7 | -- | 0.8 | -- | 1.1 | -- | 0.7 | -- |
| CSA | 0.6 | -- | 0.5 | -- | 1.4 | -- | 0.8 | -- |
| Cyprus Airways | 0.6 | -- | 0.3 | -- | 1.7 | -- | 1.3 | -- |

INTERNATIONAL AIRLINES FLOWN

Table 2 (continued)

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | 1984 | Rank | 1981 | Rank | 1984 | Rank | 1979 | Rank |
| Air UK | 0.6% | -- | 1.0% | -- | 1.5% | -- | 1.4% | -- |
| Ghana Airways | 0.5 | -- | 0.5 | -- | 0.1 | -- | 0.7 | -- |
| Iran Air | 0.5 | -- | -- | -- | 1.3 | -- | -- | -- |
| Tunis Air | 0.4 | -- | 0.6 | -- | 0.8 | -- | 1.1 | -- |
| Syrian Arab Airlines | 0.4 | -- | 0.3 | -- | 0.6 | -- | 0.5 | -- |
| Air Zaire | 0.3 | -- | 0.3 | -- | 0.4 | -- | 0.3 | -- |
| Balkan Bulgarian Airlines | 0.3 | -- | 0.2 | -- | 0.4 | -- | 0.6 | -- |
| Libyan Arab Airlines | 0.3 | -- | 0.4 | -- | 0.7 | -- | 0.5 | -- |
| Air Gabon | 0.3 | -- | 0.3 | -- | 0.7 | -- | 0.7 | -- |
| Air Mauritius | 0.3 | -- | 0.2 | -- | 0.4 | -- | 0.3 | -- |
| Air Malta | 0.3 | -- | 0.5 | -- | 0.7 | -- | 0.4 | -- |
| Iraq Airways | 0.2 | -- | 0.4 | -- | 0.4 | -- | 0.4 | -- |
| Other | 12.2 | -- | -- | -- | 20.3 | -- | -- | -- |

## IN-FLIGHT SERVICE
**********

By and large, U.S. respondents' opinions as to which international carriers provide the best and worst in-flight service are consistent, and the total U.S. ratings are quite representative of those in each region. As a rule, Other N.A. residents' ratings differ substantially from those of U.S. respondents only with regard to their home country airlines (e.g. Mexicana, Air Canada).

Respondents most frequently name Swissair and Lufthansa as the international carriers with the best in-flight service. U.S. residents most often point to British Airways as having the poorest in-flight service, while other N.A. residents think that Aeromexico offers the poorest service.

INTERNATIONAL AIRLINES WITH THE BEST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% total mentions)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Swissair | 21.1% | Lufthansa | 24.7% |
| Lufthansa | 20.1 | Swissair | 20.3 |
| British Airways | 15.6 | KLM | 18.2 |
| Singapore Airlines | 15.4 | Air France | 16.6 |
| KLM | 14.7 | Canadian Pacific | 16.5 |
| JAL | 13.1 | Mexicana | 15.4 |
| SAS | 10.5 | Air Canada | 14.7 |
| Air France | 8.6 | British Airways | 13.8 |
| Cathay Pacific | 7.5 | Singapore Airlines | 12.6 |
| Air Canada | 6.1 | JAL | 11.2 |
| Thai Airways Int'l | 5.4 | Varig | 10.5 |
| Qantas | 5.1 | SAS | 6.8 |
| | | Cathay Pacific | 5.1 |
| | | Thai International | 5.1 |

INTERNATIONAL AIRLINES WITH THE WORST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% mentions)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| British Airways | 17.6% | Aeromexico | 26.2% |
| Alitalia | 10.1 | Iberia | 10.5 |
| Mexicana | 5.9 | Alitalia | 10.3 |
| Air France | 5.7 | British Airways | 9.4 |
| Iberia | 5.4 | Mexicana | 7.6 |
| Aeromexico | 5.2 | Air France | 7.4 |
| | | Air Canada | 6.5 |
| | | Avianca | 5.6 |

## GROUND SERVICE
**********

All American respondents agree that Swissair and Lufthansa offer the best international ground service. U.S. residents designate British Airways and Alitalia as the international carriers with the worst ground service while Other N.A. residents indicate that Aeromexico and Mexicana are the worst in this respect.

INTERNATIONAL AIRLINES WITH THE BEST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Swissair | 19.6% | Lufthansa | 23.9% |
| Lufthansa | 19.5 | Swissair | 20.0 |
| British Airways | 13.6 | KLM | 16.0 |
| KLM | 12.5 | Air Canada | 14.3 |
| Singapore Airlines | 11.4 | British Airways | 13.2 |
| JAL | 10.6 | Canadian Pacific | 11.8 |
| SAS | 8.8 | Air France | 10.7 |
| Air France | 5.9 | JAL | 9.9 |
| Cathay Pacific | 5.5 | Mexicana | 9.2 |
| Air Canada | 5.1 | Singapore Airlines | 9.0 |
| | | Varig | 5.9 |

INTERNATIONAL AIRLINES WITH THE WORST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| British Airways | 15.5% | Aeromexico | 27.6% |
| Alitalia | 10.2 | Mexicana | 12.8 |
| Mexicana | 6.3 | Iberia | 11.6 |
| Air France | 6.1 | Alitalia | 9.6 |
| Aeromexico | 5.8 | British Airways | 8.6 |
| Iberia | 5.1 | Air France | 5.9 |

## MOST PREFERRED INTERNATIONAL AIRLINES

**********

Respondents named up to four international airlines they most prefer to fly. Since U.S. regional differences are generally small, only total figures are considered. All respondents agree that Swissair and Lufthansa are the most commonly preferred international carriers, with BA in third place among US respondents and KLM is a close runner-up among Other N.A. residents.

MOST PREFERRED INTERNATIONAL AIRLINES
(Includes airlines with at least 5.0% total mentions)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Swissair | 23.5% | Lufthansa | 26.3% |
| Lufthansa | 22.3 | Swissair | 24.9 |
| British Airways | 16.9 | KLM | 22.8 |
| Singapore Airlines | 16.3 | Air France | 18.9 |
| KLM | 16.1 | Singapore Airlines | 15.4 |
| JAL | 12.2 | Canadian Pacific | 15.0 |
| SAS | 12.1 | British Airways | 14.7 |
| Air France | 8.6 | Air Canada | 13.0 |
| Cathay Pacific | 7.1 | JAL | 10.6 |
| Qantas | 5.1 | Varig | 9.3 |
| | | Mexicana | 9.3 |
| | | SAS | 8.2 |
| | | Cathay Pacific | 6.1 |

With regard to the one international airline most prefered, findings are similar to those obtained in 1981 and 1979, with U.S. respondents naming Swissair and Lufthansa. Other N.A. residents frequently name Swissair, Lufthansa and Air France as most preferred. Canadian Pacific has improved its ranking to third place this year.

SINGLE MOST PREFERRED INTERNATIONAL AIRLINE
(Top ten)

| U.S. respondents | 1984 | 1981 | 1979 | Other N.A. respondents | 1984 | 1981 | 1979 |
|---|---|---|---|---|---|---|---|
| Swissair | 13.9 | 9.7 | 6.3 | Swissair | 13.4 | 9.4 | 13.1 |
| Lufthansa | 10.0 | 6.6 | 4.9 | Lufthansa | 10.5 | 9.7 | 9.1 |
| Singapore Airlines | 8.3 | 4.2 | 2.4 | Canadian Pacific | 9.3 | 7.0 | --- |
| British Airways | 7.5 | 4.7 | 4.8 | Air France | 8.3 | 10.5 | 5.9 |
| KLM | 7.3 | 5.0 | 4.3 | Air Canada | 7.3 | 7.8 | 2.0 |
| JAL | 5.2 | 4.5 | 3.5 | KLM | 6.5 | 8.0 | 6.1 |
| SAS | 5.2 | 4.0 | 3.1 | Singapore | 5.9 | 3.9 | 7.3 |
| Air France | 3.1 | 3.3 | 3.2 | JAL | 4.7 | 4.0 | 3.0 |
| British Caledonian | 2.1 | --- | --- | Mexicana | 4.7 | --- | --- |
| Qantas | 2.1 | --- | --- | British Airways | 4.0 | 4.2 | 6.2 |

In current findings, Alitalia, British Airways and El Al Israel Airlines receive the most frequent mentions as the international carriers to be avoided.

## INTERNATIONAL AIRLINES THAT WOULD BE AVOIDED

As in the 1981 findings, Other N.A. residents most often designate Aeromexico as the international airline they would most often avoid.

INTERNATIONAL AIRLINES TO BE AVOIDED
(Top ten)

| U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | | 1984 | 1981 | 1979 |
| Alitalia | 12.0% | 5.3% | 6.4% | Aeromexico | 54.6% | 56.6% | 55.5% |
| British Airways | 11.1 | 6.2 | 5.3 | Alitalia | 14.5 | 3.7 | 6.5 |
| El Al Israel | 9.5 | -- | -- | Iberia | 9.6 | 4.8 | 5.5 |
| Aeroflot | 8.1 | 3.8 | 1.7 | El Al Israel | 8.4 | -- | -- |
| Iran Air | 7.5 | 3.6 | -- | British Airways | 7.9 | 5.2 | 6.5 |
| Mexicana | 7.1 | -- | -- | | | | |
| Iberia | 6.0 | -- | -- | Mexicana | 6.8 | -- | -- |
| Aeromexico | 5.7 | 2.6 | 1.8 | Avianca | 7.4 | -- | -- |
| Air France | 6.1 | 2.4 | 3.3 | Aeroflot | 6.1 | 4.1 | 2.0 |
| Egyptair | 5.1 | -- | -- | Air France | 6.1 | 2.4 | 3.3 |
| | | | | Egyptair | 5.6 | -- | -- |

There are no major differences in choice of international airlines to be avoided according to U.S. area of residence.

**********

AIRLINE USAGE

**********

## ROUND TRIP FREQUENCY DURING PAST TWO YEARS

**********

Respondents were asked to indicate how many round trips for business and pleasure they had taken within and outside of North America on a commercial airline during the past two years. In addition, they indicated how many of these trips included an overnight stay.

U.S. respondents' business and pleasure trips are skewed heavily towards travel within North America. Other N.A. respondents travel far less for business in North America than do U.S. respondents, although their reported frequency of business travel outside of North America is double that of U.S. respondents. Among both US and other N.A. respondents, patterns of pleasure travel within North America are similar, although the former group takes slightly fewer leisure trips outside North America than does the latter. The following groups indicate the highest frequency of business travel:

* Men
* First Class Flyers
* Business Class Flyers
* Persons who have flown on the major domestic carriers during the past two years.

Pleasure travel frequency is stable across the demographic/geographic groups.

Table 3

ROUND TRIP FREQUENCY DURING THE PAST TWO YEARS.

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981* | 1979* | 1984 | 1981* | 1979* |
| Business: | | 18.1 | 17.7 | | 16.2 | 16.3 |
| Within North America (Total) | 34.6 | | | 19.0 | | |
| Within North America (inc. overnight stay) | 29.9 | | | 15.8 | | |
| Outside North America (Total) | 5.6 | | | 10.7 | | |
| Outside North America (inc. overnight stay) | 5.5 | | | 8.1 | | |
| Pleasure: | | 2.7 | 2.5 | | 3.4 | 2.6 |
| Within North America (Total) | 4.9 | | | 4.8 | | |
| Within North America (Inc. overnight stay) | 4.6 | | | 3.8 | | |
| Outside North America (Total) | 2.0 | | | 3.4 | | |
| Outside North America (Inc. overnight stay) | 2.0 | | | 2.6 | | |

* Only total figures for business and pleasure round trips available for these years.

## CLASS FLOWN MOST OFTEN

Currently, slightly fewer than half (43.0%) of the U.S. respondents generally fly economy, while 30 % most often fly discount and the remaining quarter are fairly evenly divided between those who most often fly first class (11.9%) or business class (15.1%). There has been a 7% shift away from economy fares during the last two years.

Other N.A. survey participants lean far more heavily toward business class travel than do U.S. respondents. At the same time, Other N.A. residents are far less attracted to discount fares than are the U.S. respondents. Incidence of first class and economy class travel is comparable between these two groups of respondents. Similar to findings for U.S. respondents, Other N.A. respondents show a 5% shift away from economy class and toward discount class compared to two years ago.

For all 1984 American survey respondents, men show a slightly greater tendency to fly first or business class than do women, while women tend to travel economy and discount class.

## CLASS FLOWN MOST OFTEN

(1984)

| | U.S. respondents | Other N.A. respondents | Male | Female |
|---|---|---|---|---|
| First class | 11.9% | 11.1% | 12.4% | 7.4% |
| Business class | 15.1 | 26.8 | 16.8 | 8.5 |
| Economy (full fare) | 43.0 | 46.0 | 42.2 | 48.7 |
| Discount | 30.0 | 16.0 | 28.6 | 35.4 |

(1982)

| | U.S. respondents | Other N.A. respondents | Male | Female |
|---|---|---|---|---|
| First class | 14.8% | 18.3% | 15.7% | 10.1% |
| Business class | 11.9 | 18.9 | 12.9 | 6.8 |
| Economy (full fare) | 50.3 | 51.6 | 49.5 | 55.9 |
| Discount | 23.0 | 11.2 | 21.8 | 27.1 |

## CHOOSING A FLIGHT

**********

For both business and leisure travel, respondents generally select a flight themselves, although most consult with travel agent, an airline guide, or an airline brochure prior to doing so. Other N.A. respondents are more likely to consult a travel agent than are U.S. residents.

HOW FLIGHT USUALLY SELECTED

| | Business trip | | Pleasure trip | |
|---|---|---|---|---|
| | U.S. respondents | Other N.A. respondents | U.S. respondents | Other N.A. respondents |
| Choose flight myself after referring to airline guide | 40.6% | 27.1% | 34.7% | 21.2% |
| Choose flight myself after consulting travel agent | 32.0 | 42.6 | 42.1 | 55.5 |
| Choose flight myself after referring to airline brochure. | 11.3 | 14.7 | 12.4 | 12.7 |
| Travel agent chooses flight | 4.7 | 3.7 | 5.6 | 6.0 |
| Choose flight myself after consulting secretary | 3.6 | 3.7 | 1.6 | 1.7 |
| Choose flight myself after consulting corporate travel department | 2.2 | 3.3 | 0.9 | 1.3 |
| Corporate travel department chooses flight | 2.0 | 1.6 | 0.1 | 0.3 |
| Secretary chooses flight | 2.0 | 2.0 | 0.5 | -- |
| Other | 1.7 | 1.2 | 2.1 | 1.4 |

## IMPORTANT FACTORS IN CHOOSING AN AIRLINE

Regardless of the length of the flight, U.S. residents consider four factors to be the most important in their choice of an airline:

* Convenient schedule
* Low fares
* Past experience (ranked fourth for flights of two hours or longer)
* Frequent flyer program (ranked third for flights of two hours or longer)

Other N.A. respondents share U.S. passengers' concern with convenient schedules, as this is the number one priority regardless of flight duration. However, they give notably less precedence to low fares than do their U.S. counterparts. In addition, quality of in-flight service consistently receives higher overall priority among Other N.A. respondents than among U.S. respondents.

When choosing an airline for short flights (under two hours) all respondents most often consider schedule and past experience with the airline, while for longer flights quality of service becomes more crucial as flight frequency and punctuality diminish in importance.

Table 4

MOST IMPORTANT FACTORS IN CHOOSING AN AIRLINE

Flights Under 2 hours

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | Average | Rank | Average | Rank |
| Convenient schedule | 72.8% | 1 | 67.0% | 1 |
| Low fares | 35.4 | 2 | 19.7 | 5 |
| Past experience | 31.2 | 3 | 32.7 | 3 |
| Frequent flyer programme | 28.7 | 4 | 11.3 | 10 |
| Frequency of flights | 27.2 | 5 | 35.9 | 2 |
| On-time performance | 15.8 | 6 | 24.4 | 4 |
| Attitude of personnel | 14.9 | 7 | 11.5 | 9 |
| Safety record | 12.7 | 8 | 16.1 | 6 |
| Aircraft type | 12.0 | 9 | 14.1 | 7 |
| Quality of in-flight service | 8.3 | 10 | 13.4 | 8 |
| Quality of food and drinks | 3.7 | 11 | 6.3 | 11 |
| Quality of ground service | 3.0 | 12 | 5.7 | 12 |
| Availability of business class | 2.6 | 13 | 3.7 | 13 |
| Other | 0.9 | 14 | 1.3 | 14 |

Table 4 (Continued)

Flights of 2 - 5 hours

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | Average | Rank | Average | Rank |
| Convenient schedule | 65.6% | 1 | 61.4% | 1 |
| Low fares | 34.5 | 2 | 21.8 | 4 |
| Past experience | 30.9 | 4 | 29.7 | 2 |
| Frequent flyer programme | 31.7 | 3 | 14.0 | 9 |
| Frequency of flights | 12.7 | 9 | 13.4 | 11 |
| On-time performance | 12.5 | 10 | 17.3 | 6 |
| Attitude of personnel | 17.3 | 6 | 14.6 | 8 |
| Safety record | 12.8 | 8 | 16.3 | 7 |
| Aircraft type | 17.4 | 5 | 19.0 | 5 |
| Quality of in-flight service | 15.3 | 7 | 26.5 | 3 |
| Quality of food and drinks | 8.5 | 11 | 13.6 | 10 |
| Quality of ground service | 3.0 | 13 | 4.8 | 13 |
| Availability of business class | 5.2 | 12 | 7.8 | 12 |
| Other | 1.0 | 14 | 1.5 | 14 |

Table 4 (Continued)

Flights over 5 hours

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | Average | Rank | Average | Rank |
| Convenient schedule | 53.7% | 1 | 43.4% | 1 |
| Low fares | 34.4 | 2 | 26.0 | 5 |
| Past experience | 30.2 | 4 | 28.0 | 3 |
| Frequent flyer programme | 30.6 | 3 | 12.7 | 11 |
| Frequency of flights | 8.1 | 11 | 7.2 | 12 |
| On-time performance | 9.8 | 10 | 12.7 | 10 |
| Attitude of personnel | 17.6 | 7 | 16.4 | 8 |
| Safety record | 15.4 | 8 | 19.0 | 7 |
| Aircraft type | 24.5 | 5 | 27.5 | 4 |
| Quality of in-flight service | 20.7 | 6 | 32.7 | 2 |
| Quality of food and drinks | 12.0 | 9 | 21.0 | 6 |
| Quality of ground service | 2.8 | 13 | 4.8 | 13 |
| Availability of business class | 7.4 | 12 | 12.9 | 9 |
| Other | 1.5 | 14 | 1.7 | 14 |

## SINGLE MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT

**********

Schedule is the single most important factor in the selection of a flight lasting less than two hours. For somewhat longer flights (2-5 hours), schedule is still a prime consideration; however, the airline to be flown also has substantial importance, especially for Other N.A. residents. For flights lasting more than five hours, the airline is the single most important criterion, again being even more important to Other N.A. respondents than U.S. residents. Regardless of the flight duration, fare and aircraft are secondary considerations, although the importance of each increases for longer flights.

MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT - 1984

Flights Under 2 Hours

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Schedule | 64.0% | 65.9% |
| Airline | 16.5 | 19.1 |
| Fare | 16.3 | 12.1 |
| Aircraft | 2.5 | 2.5 |
| Other | 0.8 | 0.3 |

Flights 2 - 5 hours

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Schedule | 42.8% | 38.5% |
| Airline | 27.9 | 36.4 |
| Fare | 20.4 | 15.7 |
| Aircraft | 8.1 | 8.7 |
| Other | 0.9 | 0.6 |

Flights of 5 hours

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Schedule | 26.0% | 19.4% |
| Airline | 34.0 | 44.3 |
| Fare | 22.5 | 19.5 |
| Aircraft | 16.5 | 16.2 |
| Other | 1.0 | 0.7 |

## EVALUATION OF OVERALL AIRLINE SERVICES

At least one fifth of the 1984 American survey respondents name each of the following airline services as being among the most important.

* Pre-reserved seat assignment
* Fast check-in
* Flight attendant attitude/behaviour
* Leg-room
* Quick baggage retrieval
* Carry-on baggage compartments
* Seat width
* Food service (Other N.A. respondents only)

At the same time, these services are the most commonly designated as needing improvement. The following services receive the most complaints (at least 40% of the respondents):

* Quick baggage retrieval
* Leg-room
* Seat width
* Fast check-in

Table 5

EVALUATION OF AIRLINE SERVICES

| | Among the most important services | | Needs improvement | |
|---|---|---|---|---|
| | U.S. respondents | Other N.A. respondents | U.S. respondents | Other N.A. respondents |
| Pre-reserved seat assignment | 66.1% | 46.4% | 21.9% | 23.7% |
| Fast check-in | 40.3 | 46.4 | 42.2 | 46.2 |
| Flight attendant attitude/behaviour | 36.9 | 42.8 | 29.6 | 32.9 |
| Leg-room | 35.8 | 35.5 | 54.9 | 49.5 |
| Quick baggage retrieval | 31.0 | 29.9 | 61.2 | 59.7 |
| Carry-on baggage compartments | 28.9 | 19.9 | 36.2 | 30.4 |
| Seat width | 25.4 | 22.0 | 46.0 | 40.0 |
| Food service | 14.8 | 22.4 | 34.5 | 35.1 |
| Special first class and business class lounges | 8.0 | 14.7 | 7.8 | 10.1 |
| Availability of sky-caps/porters | 4.6 | 2.7 | 13.0 | 8.5 |
| Adequate waiting areas | 4.3 | 7.6 | 16.1 | 22.2 |
| Beverage service | 2.7 | 4.6 | 7.1 | 9.5 |
| In-flight audio/ video entertainment | 2.3 | 4.2 | 6.9 | 10.9 |
| Magazines and newspapers | 1.5 | 3.3 | 6.4 | 12.2 |
| Other | 1.5 | 0.7 | 2.8 | 2.5 |

## ATTITUDES TOWARDS AIRFARES
**********

Regardless of demographic/geographic group, three quarters of this year's American survey participants consider current air fares to be expensive: almost half describe fares as somewhat expensive, and one in four think think that they are very expensive.

EVALUATION OF AIRFARES

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Very expensive | 28.1% | 26.3% |
| Somewhat expensive | 45.8 | 48.3 |
| Approximately as expected | 22.4 | 22.8 |
| Somewhat inexpensive | 3.3 | 2.4 |
| Very inexpensive | 0.5 | 0.1 |

## ATTITUDES TOWARD DEREGULATION

In 1981, almost half of the American respondents felt that air travel had improved due to industry deregulation, while others were fairly evenly divided as to whether air travel had deteriorated or remained unaffected. 1984 findings indicate that half of the Other N.A. respondents still feel that deregulation has improved, but there has been a sharp increase in the number of U.S. residents who have found air travel to have deteriorated due to deregulation.

### PERCEIVED EFFECTS OF DEREGULATION

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| Air travel has improved | 35.2% | 43.3% | 51.2% | 44.8% |
| Air travel has deteriorated | 49.2 | 30.8 | 30.0 | 24.6 |
| Air travel has not been affected. | 15.6 | 25.8 | 18.8 | 30.5 |

Respondents perceive the major advantages and disadvantages of deregulation to be as follows:

PERCEIVED ADVANTAGES OF DEREGULATION

| | 1984 U.S. respondents | 1984 Other N.A. respondents |
|---|---|---|
| Lower fares | 64.9% | 71.7% |
| More competition | 59.3 | 56.6 |
| Larger choice of airlines | 34.6 | 27.2 |
| More flights (better schedules) | 26.3 | 26.7 |
| Amenities for business passengers | 19.0 | 17.3 |
| Better service | 15.0 | 24.9 |
| Less crowded aircraft | 10.4 | 12.4 |

PERCEIVED DISADVANTAGES OF DEREGULATION

| | 1984 U.S. respondents | 1984 Other N.A. respondents |
|---|---|---|
| Fewer flights (worse schedules) | 53.7% | 39.4% |
| Crowded aircraft | 51.7 | 51.7 |
| More confusion | 47.8 | 46.3 |
| Worse service | 43.7 | 39.8 |
| Higher fares | 35.4 | 18.9 |
| Business passenger neglect | 32.6 | 29.0 |
| Fewer choices of airlines | 20.2 | 15.9 |

## FREQUENT FLYER PROGRAMS
**********

More than half of this year's U.S. respondents and one third of the Other N.A. respondents fly at least one airline more often than others because of membership in its frequent flyer program.

IS THERE AN AIRLINE YOU FLY MORE OFTEN BECAUSE OF ITS FREQUENT FLYER PROGRAM ?

| | 1984 U.S. respondents | 1984 Other N.A. respondents |
|---|---|---|
| Yes | 57.8% | 35.9% |
| No | 42.2 | 64.1 |

Those who answered yes to the above question were asked to what lengths they would be likely to go to fly on the airlines with their preferred frequent flyer program. The results are as follows:

IN ORDER TO FLY ON THE AIRLINE WITH PREFERRED FREQUENT FLYER PROGRAM RESPONDENT WOULD:

| | U.S. respondents | | | | Other N.A. respondents | | | |
|---|---|---|---|---|---|---|---|---|
| | Very likely | Somewhat likely | Somewhat 1981 | Somewhat unlikely | Very likely | Somewhat likely | Somewhat 1981 | Somewhat unlikely |
| Make more stops en-route | 16.7% | 26.3% | 19.9% | 37.1% | 16.4% | 25.9% | 21.7% | 36.0% |
| Pay slightly higher fare | 11.7 | 26.8 | 28.0 | 33.5 | 11.4 | 27.6 | 29.7 | 31.4 |
| Fly at a less convenient time | 23.5 | 40.4 | 18.7 | 17.5 | 31.8 | 35.4 | 14.6 | 18.2 |
| Take a circuitous route | 8.7 | 16.5 | 24.1 | 50.7 | 9.9 | 21.0 | 19.3 | 49.7 |

**********

AIRCRAFT EXPERIENCE

**********

## AIRCRAFT FLOWN DURING PAST TWO YEARS

**********

Respondents were provided with a list of aircraft and asked on which they had flown during the past two years. As in previous years, the Boeing 727 is the plane most frequently flown by American respondents. In all, the most frequently flown aircraft (flown by at least two-thirds of U.S. and Other N.A. respondents) are as follows:

AIRCRAFT FLOWN DURING PAST TWO YEARS

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979* | 1984 | 1981 | 1979* |
| 727 | 92.5% | 92.0% | 95.1% | 91.8% | 91.9% | 93.0% |
| DC-10 | 80.0 | 83.5 | 88.9 | 90.1 | 89.2 | 92.5 |
| 747 | 78.8 | 74.5 | 87.0 | 86.0 | 86.3 | 95.4 |
| 737 | 76.4 | 59.8 | 69.2 | 67.3 | 52.8 | 74.9 |
| L-1011 | 75.5 | 71.3 | 73.3 | 66.4 | 69.7 | 66.0 |
| DC-9 | 71.6 | 75.3 | 79.8 | 76.6 | 84.2 | 86.3 |
| DC-8 | 47.1 | 59.8 | 78.9 | 52.2 | 72.7 | 86.9 |
| A300 | 36.1 | 24.7 | 15.5 | 41.5 | 28.9 | 47.7 |
| 767 | 35.8 | ---- | ---- | 24.5 | ---- | ---- |
| DC-9/80 | 32.4 | ---- | ---- | 34.8 | ---- | ---- |
| 757 | 25.5 | ---- | ---- | 13.7 | ---- | ---- |
| BAC 1-11 | 23.7 | ---- | ---- | 22.7 | ---- | ---- |
| F-28 | 12.4 | ---- | ---- | 14.2 | ---- | ---- |
| A310 | 9.2 | ---- | ---- | 17.6 | ---- | ---- |
| Concorde | 6.0 | 5.4 | 5.6 | 11.9 | 12.0 | 14.7 |

* No time limit specified

## IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

For a flight lasting under two hours, almost half of the 1984 American respondents feel that safety and overall comfort rank among the most important factors in aircraft preference. In addition, about one in three respondents cites leg room, past experience and spaciousness as important criteria. For longer flights, comfort, leg-room and spaciousness become increasingly important, while safety and past experience become slightly less critical.

Women are definitely more concerned with safety than are men.

Table 6

IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

U.S. Respondents

| Duration of flight: | Under 2 hours | | 2 - 5 hours | | Over 5 hours | |
|---|---|---|---|---|---|---|
| | Mean | Rank | Mean | Rank | Mean | Rank |
| Safety | 44.0%[1] | 1 | 40.5%[2] | 3 | 40.6%[3] | 3 |
| Overall comfort | 42.2 | 2 | 47.5 | 1 | 51.0 | 1 |
| Leg room | 34.8 | 3 | 39.9 | 4 | 39.4 | 4 |
| Past experience | 32.7 | 4 | 27.1 | 6 | 24.8 | 6 |
| Spaciousness | 30.2 | 5 | 40.8 | 2 | 47.0 | 2 |
| Baggage storage | 26.5 | 6 | 16.8 | 7 | 12.4 | 8 |
| Seat width | 24.0 | 7 | 28.2 | 5 | 28.6 | 5 |
| Noise level | 15.9 | 8 | 15.1 | 8 | 14.4 | 7 |
| Reputation | 12.3 | 9 | 9.6 | 9 | 9.2 | 9 |
| Manufacturer | 5.3 | 10 | 5.0 | 11 | 4.9 | 11 |
| Overall size | 4.7 | 11 | 5.1 | 10 | 6.2 | 10 |

1 Males 41.9% vs. females 66.8%
2 Males 38.5% vs. females 61.8%
3 Males 38.5% vs. females 60.7%

Table 6 (Continued)

Other N.A. Respondents

| Duration of flight: | Under 2 hours | | 2 - 5 hours | | Over 5 hours | |
|---|---|---|---|---|---|---|
| | Mean | Rank | Mean | Rank | Mean | Rank |
| Safety | 47.7%[1] | 1 | 44.5%[2] | 1 | 42.6%[3] | 3 |
| Overall comfort | 39.6 | 2 | 43.1 | 3 | 46.9 | 2 |
| Leg room | 29.9 | 4 | 36.5 | 4 | 35.5 | 4 |
| Past experience | 33.2 | 3 | 26.6 | 5 | 23.6 | 6 |
| Spaciousness | 29.0 | 5 | 43.6 | 2 | 49.3 | 1 |
| Baggage storage | 21.8 | 6 | 12.2 | 8 | 9.1 | 9 |
| Seat width | 20.4 | 7 | 25.7 | 6 | 29.0 | 5 |
| Noise level | 19.5 | 8 | 18.5 | 7 | 16.9 | 7 |
| Reputation | 14.5 | 9 | 10.5 | 9 | 10.5 | 8 |
| Manufacturer | 7.2 | 10 | 4.5 | 10 | 5.5 | 10 |
| Overall size | 4.4 | 11 | 4.5 | 10 | 3.4 | 11 |

1 Males 41.9% vs. females 66.8%
2 Males 38.5% vs. females 61.8%
3 Males 38.5% vs. females 60.7%

## MOST PREFERED AIRCRAFT
**********

Similar to 1981 findings for flights under two hours, respondents most commonly prefer to fly the Boeing 727. For longer flights, the Boeing 747 is the most popular choice, followed by the Lockheed L-1011 and the McDonnell Douglas DC-10. These findings are consistent in demographic/geographic subgroups.

Table 7

MOST PREFERRED AIRCRAFT

Flights under 2 hours

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| 727 | 32.6% | 38.8% | 39.2% | 41.5% |
| 737 | 13.1 | 12.1 | 11.3 | 9.9 |
| L-1011 | 10.6 | 15.1 | 9.0 | 12.4 |
| 747 | 7.7 | 7.3 | 7.9 | 7.7 |
| 767 | 7.1 | --- | 4.5 | --- |
| DC-9/80 | 6.5 | --- | 3.2 | --- |
| DC-9 | 5.7 | 9.0 | 5.8 | 8.4 |
| DC-10 | 5.6 | 10.5 | 5.8 | 9.8 |
| A300 | 4.4 | 3.5 | 8.1 | 6.5 |
| 757 | 4.2 | --- | 1.9 | --- |

Table 7 (continued)

Flights of 2-5 hours (1984)/3+ hours (1981)

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| 747 | 26.3% | 46.7% | 31.4% | 49.0% |
| L-1011 | 26.0 | 28.3 | 19.0 | 21.3 |
| DC-10 | 15.9 | 18.0 | 22.7 | 20.2 |
| 727 | 8.6 | 2.8 | 8.9 | 2.2 |
| 767 | 8.6 | --- | 5.4 | --- |
| 757 | 3.4 | --- | 1.7 | --- |
| A300 | 2.6 | 0.8 | 4.1 | 1.0 |
| 737 | 2.5 | --- | 1.3 | --- |
| Concorde | 2.1 | 1.4 | 3.1 | 4.5 |
| DC-9/80 | 1.3 | --- | 0.7 | --- |

Flights of 5+ Hours

| | 1984 U.S. respondents | 1984 Other N.A. respondents |
|---|---|---|
| 747 | 57.4% | 61.8% |
| L-1011 | 19.2 | 15.2 |
| DC-10 | 11.1 | 12.3 |
| Concorde | 3.7 | 12.7 |
| 767 | 3.3 | 6.8 |
| 727 | 1.3 | 0.9 |
| 757 | 1.2 | 1.8 |
| 737 | 0.9 | 1.3 |
| A300 | 0.8 | 0.7 |
| DC-8 | 0.3 | 0.4 |

## AIRCRAFT THAT WOULD BE AVOIDED

For flights lasting under two hours, respondents would most commonly seek to avoid the McDonnell Douglas DC-9. The DC-10, BAC 1-11 and DC-8 also receive relatively frequent mentions for this question.

For two to five hour flights, U.S. respondents would most often avoid the McDonnell Douglas DC-10 and DC-9, while Other N.A. residents mention the DC-9 and DC-8 as the aircraft to be avoided.

For flights over five hours, respondents name the McDonnell Douglas DC-10 as the aircraft to be avoided while among Other N.A. respondents, the DC-8, DC-10 and DC-9 all receive relatively frequent mentions.

(The L-1011, DC-9/80, 767 and 757 received less than 3% mentions.)

Table 8

AIRCRAFT TO BE AVOIDED

Flights of under 2 hours

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| DC-9 | 17.9% | 26.6% | 25.4% | 31.8% |
| DC-10 | 16.1 | 17.8 | 12.6 | 12.8 |
| BAC 1-11 | 10.8 | ---- | 8.1 | ---- |
| DC-8 | 10.2 | 11.1 | 15.1 | 19.9 |
| 737 | 9.6 | 8.8 | 5.4 | 5.6 |
| 727 | 9.2 | 9.5 | 6.3 | 4.4 |
| F-28 | 8.3 | --- | 7.4 | --- |
| 747 | 5.5 | 4.7 | 10.1 | 6.2 |
| A300 | 3.4 | 2.7 | 2.0 | 1.8 |
| Concorde | 3.3 | 3.6 | 4.0 | 2.7 |

Flights of 2-5 hours (1984)/3+ hours (1981)

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| DC-10 | 18.6% | 20.9% | 13.3% | 13.7% |
| DC-9 | 18.2 | 17.5 | 25.5 | 20.9 |
| 727 | 15.9 | 12.9 | 13.8 | 5.3 |
| DC-8 | 11.5 | 13.7 | 18.6 | 26.7 |
| 737 | 9.4 | 5.7 | 6.8 | 4.7 |
| BAC1-11 | 6.6 | --- | 5.9 | --- |
| F-28 | 5.7 | --- | 3.7 | --- |
| A300 | 3.3 | 2.1 | 2.4 | 1.8 |
| L-1011 | 3.2 | 2.7 | 2.0 | 2.4 |
| 747 | 2.1 | 4.6 | 3.3 | 6.0 |

Flights of 5+ Hours

| | 1984 U.S. respondents | 1984 Other N.A. respondents |
|---|---|---|
| DC-10 | 22.6% | 18.1% |
| 727 | 16.6 | 13.9 |
| DC-8 | 14.4 | 24.9 |
| DC-9 | 13.3 | 18.1 |
| 737 | 6.9 | 4.0 |
| BAC1-11 | 5.1 | 2.4 |
| F-28 | 4.7 | 3.1 |
| L-1011 | 4.0 | 4.0 |
| A300 | 3.4 | 2.6 |
| 747 | 2.9 | 4.0 |

## PERCEPTIONS OF COMMERCIAL AIRCRAFT MANUFACTURERS

The Boeing Commercial Airplane Company is by far the manufacturer most commonly perceived by American respondents to produce the best commercial aircraft.

AIRCRAFT MANUFACTURERS PERCEIVED TO PRODUCE THE BEST COMMERCIAL AIRCRAFT

| | U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| Boeing | 75.1% | 67.8% | 75.4% | 67.3% |
| McDonnell Douglas | 11.4 | 13.3 | 11.4 | 13.9 |
| Lockheed | 11.2 | 17.1 | 9.6 | 15.4 |
| Airbus Industrie | 1.5 | 1.8 | 2.8 | 3.4 |
| British Aerospace | 0.4 | --- | 0.5 | --- |
| Other | 0.4 | 1.3 | 0.2 | 1.5 |

## SMOKING ON THE AIRCRAFT
**********

Almost 80% of this year's American respondents usually sit in the non-smoking section of the aircraft.

SECTION OF AIRCRAFT IN WHICH USUALLY SIT

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Smoking | 20.1% | 22.4% |
| Non-smoking | 79.9 | 77.6 |

Well over half of the respondents favor the idea of a smoking ban on flights of under two hours in duration, and fewer than one in five would object to such a ban. On longer flights, about half the respondents (56.5% among Other N.A. residents) would favour a smoking ban, while about one in four voice an objection to this idea.

REACTIONS TO PROPOSED CIGARETTE SMOKING BAN

| | On flights less than 2 hours | | On flights 2 hours or more | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| Strongly in favor | 57.8% | 52.1% | 44.0% | 40.5% |
| Somewhat in favor | 8.4 | 11.7 | 15.1 | 16.0 |
| Makes no difference | 16.2 | 20.3 | 16.6 | 20.1 |
| Somewhat opposed | 4.6 | 3.8 | 5.6 | 6.3 |
| Strongly opposed | 13.0 | 12.1 | 18.8 | 17.2 |

**********

AIRPORT FACILITIES

**********

1984 respondents reported into which domestic and international airports they have flown during the past two years.

## DOMESTIC AIRPORTS FLOWN INTO DURING PAST TWO YEARS

**********

In total, at least half of the U.S. respondents have flown into these U.S. airports within the last two years:

* Atlanta
* Chicago
* Los Angeles
* Dallas/Ft. Worth
* New York (Kennedy)
* San Francisco
* New York (La Guardia)

At least half of the Other N.A. respondents have flown into these U.S. airports during the last two years:

* New York (Kennedy)
* Los Angeles
* Dallas/Ft. Worth
* Chicago (O'Hare)

Table 9

DOMESTIC AIRPORTS FLOWN INTO DURING PAST TWO YEARS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Atlanta | 67.8% | 45.4% |
| Chicago (O'Hare) | 67.6 | 50.0 |
| Los Angeles | 60.4 | 59.1 |
| Dallas/Ft. Worth | 59.0 | 52.1 |
| New York (Kennedy) | 53.4 | 60.4 |
| San Francisco | 51.8 | 40.7 |
| New York (La Guardia) | 50.4 | 46.1 |
| Denver | 46.4 | 25.3 |
| Washington (National) | 44.3 | 22.4 |
| Boston | 42.2 | 31.9 |
| Miami | 40.7 | 48.3 |
| Newark | 36.3 | 18.2 |
| Houston | 35.6 | 46.7 |
| St. Louis | 34.8 | 12.2 |
| Las Vegas | 30.3 | 22.5 |
| New Orleans | 29.6 | 18.9 |
| Philadelphia | 28.4 | 16.3 |
| Kansas City | 27.9 | 7.0 |
| Phoenix | 27.9 | 13.4 |
| Minneapolis/St. Paul | 27.5 | 14.9 |
| Tampa | 27.1 | 16.3 |
| Baltimore | 27.0 | 10.5 |
| Seattle/Tacoma | 26.6 | 13.7 |
| Pittsburgh | 26.5 | 11.5 |
| Honolulu | 26.5 | 16.7 |
| Detroit | 26.4 | 15.1 |
| Orlando | 25.7 | 16.7 |
| San Diego | 22.9 | 19.2 |
| Ft. Lauderdale | 22.8 | 13.3 |
| Cleveland | 22.6 | 11.3 |
| Washington (Dulles) | 22.4 | 14.6 |
| Houston (Hobby) | 20.7 | 20.0 |
| Charlotte | 20.6 | 6.8 |
| Cincinnati | 19.7 | 6.9 |
| Chicago (Midway) | 19.6 | 9.9 |
| Memphis | 18.7 | 5.0 |
| Salt Lake City | 17.9 | 6.8 |
| Dallas (Love Field) | 15.8 | 8.4 |
| Portland | 15.6 | 5.2 |
| Milwaukee | 13.9 | 4.8 |
| Birmingham | 9.8 | 1.4 |
| Tucson | 8.3 | 4.6 |
| Other | 32.2 | 25.0 |

Respondents also indicated which U.S. airports they have used most frequently during the past two years. In each region, at least 20% of the respondents mention the following U.S. airports:

Table 10

DOMESTIC AIRPORTS USED MOST FREQUENTLY IN PAST TWO YEARS

| U.S. Total | U.S. East | U.S. South/ South Central | U.S. North Central | U.S. West | Other N.A. |
|---|---|---|---|---|---|
| Chicago O'Hare (41.3%) | New York La Guardia (42.3%) | Atlanta (58.3%) | Chicago O'Hare (73.7%) | Los Angeles (63.5%) | New York Kennedy (41.1%) |
| Atlanta (35.5%) | Chicago O'Hare (40.8%) | Dallas/ Ft. Worth (45.6%) | Atlanta (33.2%) | San Francisco (45.5%) | Los Angeles (36.1%) |
| Los Angeles (29.4%) | New York Kennedy (40.8%) | Chicago O'Hare (25.7%) | New York La Guardia (25.7%) | Chicago O'Hare (35.4%) | Miami (31.5%) |
| New York Kennedy (25.8%) | Atlanta (31.8%) | | | | Chicago O'Hare (31.3%) |
| New York La Guardia (25.4%) | Washington National (30.1%) | | | Denver (31.7%) | Houston Int. (31.0%) |
| Dallas Ft.Worth (25.2%) | Newark (26.6%) | | | Dallas Ft. Worth (25.6%) | Dallas Ft. Worth (29.4%) |
| | Los Angeles (22.8%) | | | New York Kennedy (25.5%) | New York La Guardia (25.2%) |

## INTERNATIONAL AIRPORTS FLOWN INTO DURING PAST TWO YEARS

**********

Regardless of U.S. area of residence, nearly half the 1984 respondents report having flown into London (Heathrow) International Airport (44.3%) within the last two years. Additionally, about 20% have flown into:

| | | |
|---|---|---|
| * | Honolulu | 26.9% |
| * | Frankfurt | 26.8 |
| * | Toronto | 23.6 |
| * | Paris (de Gaulle) | 22.0 |
| * | Mexico City | 21.0 |
| * | London (Gatwick) | 19.8 |
| * | Montreal | 19.7 |
| * | Amsterdam | 19.5 |
| * | Tokyo | 19.0 |

All 1984 American respondents designate London (Heathrow) and Frankfurt as being among the five international airports used most frequently during the past two years.

By area of residence, the international airports used most frequently by at least 20% of the respondents are as follows:

| U.S. Total | U.S. East | U.S.South/ South Central | U.S. North Central | U.S. West | Other N.A. |
|---|---|---|---|---|---|
| London (Heathrow) (49.7%) | London (Heathrow) (53.8%) | London (Heathrow) (44.9%) | London (Heathrow) (50.3%) | London (Heathrow) (50.6%) | Mexico City (41.3%) |
| Frankfurt (22.7%) | Frankfurt (23.5%) | London (Gatwick) (25.8%) | Frankfurt (25.3%) | Honolulu (29.3%) | London Heathrow (34.1%) |
| | | Frankfurt (22.9%) | | Frankfurt (20.7%) | Toronto (27.6%) |
| | | | | | Montreal (24.4%) |
| | | | | | Frankfurt (20.2%) |

## BEST LIKED AIRPORTS OVERALL
**********

(NOTE: In previous years' surveys, respondents evaluated U.S. and international airports together, whereas in 1984, they evaluated them separately).

### U.S. Airports
==========

As in previous years, U.S. respondents most frequently name Tampa, Atlanta, and Dallas/Ft. Worth as their favourite U.S. airports. However, Dallas/Ft. Worth has shown a decline in popularity since 1981. By U.S. region of residence, the most favoured domestic airports (with at least 10% mentions) are:

| East | South/ South Central | North Central | West |
|---|---|---|---|
| Newark (12.4%) | Atlanta (54.2%) | Tampa (16.8%) | San Francisco (13.1%) |
| Tampa (11.9%) | Tampa (21.6%) | Chicago O'Hare) (13.4%) | Seattle/ Tacoma (11.5%) |
| Atlanta (10.1%) | Dallas/ Ft. Worth (17.5%) | Atlanta (12.0%) | |

As in earlier years, Dallas/Ft. Worth is the most popular U.S. airport among Other N.A. respondents. This year, Atlanta and Houston airports are also favoured among other N.A. residents.

## International airports

Amsterdam and Frankfurt are the best liked international airports among 1984 U.S. respondents. This is true regardless of geographic subgroup. Similar to earlier years' results, Amsterdam, de Gaulle and Frankfurt airports are all popular with this year's other N.A. respondents.

Table 11

AIRPORTS LIKED BEST OVERALL

Domestic respondents

| 1984 | | | | | | |
|---|---|---|---|---|---|---|
| Domestic | | International | | | 1981* | 1979* |
| Tampa | 14.2% | Amsterdam | 13.0% | Tampa | 16.2% | 13.8% |
| Atlanta | 13.0 | Frankfurt | 11.0 | Dallas/ Ft. Worth | 13.7 | 13.5 |
| Dallas/ Ft. Worth | 8.5 | London/ Heathrow | 10.4 | Atlanta | 13.4 | ---- |
| Newark | 5.0 | Honolulu | 7.6 | Chicago (O'Hare) | 5.4 | 9.3 |
| Chicago (O'Hare) | 4.9 | Paris (de Gualle) | 7.4 | Seattle | 4.4 | 4.4 |
| San Francisco | 4.7 | Zurich | 6.5 | Washington (Dulles) | 4.1 | 5.6 |
| Washington (Dulles) | 4.6 | Singapore | 6.2 | Newark | 4.0 | 5.0 |
| Seattle/Tacoma | 3.9 | Tokyo | 3.8 | Kansas City | 3.0 | 2.9 |
| Orlando | 3.1 | London (Gatwick) | 3.4 | New York (Kennedy) | 2.2 | 3.5 |
| New York (Kennedy) | 2.8 | Toronto | 3.4 | Los Angeles | 2.1 | 3.9 |

## Other N.A. respondents

| 1984 | | | | | |
|---|---|---|---|---|---|
| Domestic | | International | | 1981 * | 1979 * |
| Dallas/ Ft. Worth | 16.2% | Amsterdam | 16.6% | Dallas/ Ft. Worth 14.7% | 6.5% |
| Atlanta | 11.9 | Paris (de Gaulle) | 13.4 | Amsterdam 9.3 | 8.7 |
| Houston Int'l | 10.4 | Frankfurt | 11.9 | Paris (de Gaulle) 8.4 | 8.9 |
| Miami | 6.5 | Zurich | 5.9 | Tampa 7.4 | 3.9 |
| Tampa | 6.2 | Singapore | 5.9 | Frankfurt 7.2 | 8.8 |
| San Fransisco | 5.8 | Toronto | 5.1 | Atlanta 5.9 | --- |
| Boston | 4.0 | Mexico City | 4.7 | Toronto 4.3 | 2.7 |
| Seattle/Tacoma | 3.5 | Vancouver | 4.3 | Chicago O'Hare 4.0 | --- |
| New York (Kennedy) | 3.2 | Montreal | 4.2 | Houston 3.6 | --- |
| Chicago O'Hare | 2.8 | London (Heathrow) | 3.8 | Seattle 3.1 | --- |

* U.S. and International airports combined.

## LEAST LIKED AIRPORTS OVERALL
**********

(NOTE: In previous years' surveys, respondents evaluated U.S. and international airports together, whereas in 1984, they evaluated them separately).

### U.S. airports
==========

As in 1981 and 1979, current domestic respondents concur that Chicago (O'Hare) is the least liked domestic airport, with New York's Kennedy and Los Angeles also receiving relatively frequent mentions. These findings are fairly similar in each U.S. region.

Other N.A. respondents name Kennedy, Los Angeles and O'Hare, in that order, as the least favourite U.S. airports. These findings are similar to those obtained in earlier years.

### International airports
==========

London's Heathrow is decidedly the least popular international airport among U.S. respondents, regardless of region of residence. As in earlier years, Mexico City is Other N.A. respondents' least favored international airport, with Heathrow ranking in second place.

Table 12

## AIRPORTS LIKED LEAST OVERALL

### Domestic respondents

| 1984 | | | | | |
|---|---|---|---|---|---|
| Domestic | | International | | 1981* | 1979* |
| Chicago (O'Hare) | 16.9% | London (Heathrow) | 22.2% | Chicago (O'Hare) | 16.6% | 16.8% |
| New York (Kennedy) | 12.8 | Mexico City | 7.5 | New York (Kennedy) | 10.5 | 7.8 |
| Los Angeles | 10.9 | Rome | 6.8 | Los Angeles | 9.3 | 7.4 |
| Atlanta | 8.4 | Cairo | 4.3 | Atlanta | 7.0 | 16.6 |
| Washington (National) | 7.3 | Tokyo | 3.9 | Washington (National) | 5.5 | 4.8 |
| Dallas/ Ft. Worth | 7.0 | Paris (de Gaulle) | 3.3 | New York (La Guardia) | 5.0 | 3.8 |
| New York (La Guardia) | 6.3 | Paris (Orly) | 2.8 | Dallas/ Ft. Worth | 5.0 | 4.7 |
| Miami | 4.2 | Frankfurt | 2.8 | Miami | 3.4 | 2.6 |
| Denver | 3.4 | Athens | 2.8 | Heathrow | 3.0 | --- |
| Pittsburgh | 1.9 | Milan (Linate) | 2.6 | Denver | 2.0 | --- |

### Other N.A. respondents

| 1984 | | | | | |
|---|---|---|---|---|---|
| Domestic | | International | | 1981* | 1979* |
| New York (Kennedy) | 21.1% | Mexico City | 18.5% | New York (Kennedy) | 9.6% | 7.9% |
| Los Angeles | 16.6 | London (Heathrow) | 15.9 | Mexico City | 9.4 | 2.5 |
| Chicago (O'Hare) | 14.0 | Rome | 5.7 | Los Angeles | 7.2 | 5.3 |
| Miami | 8.6 | Montreal | 5.7 | Chicago (O'Hare) | 6.5 | 3.0 |
| New York (La Guardia) | 7.7 | Toronto | 5.5 | London (Heathrow) | 6.3 | 8.4 |
| Washington (National) | 3.9 | Madrid | 4.9 | Toronto | 6.3 | 2.1 |
| Dallas/ Ft. Worth | 2.9 | Cairo | 4.5 | Miami | 5.2 | 11.3 |
| Houston Int'l | 2.3 | Bombay | 3.3 | New York (La Guardia) | 2.4 | --- |
| Atlanta | 2.1 | Bogota | 3.3 | Atlanta | 1.6 | --- |
| Denver | 1.6 | Athens | 1.8 | | | |

* U.S. and International airports combined.

## EVALUATION OF AIRPORT SERVICES AND FACILITIES

**********

From a list, 1984 American respondents indicated three service/facility factors that are most important to them in their evaluation of an airport. In addition, they indicated which items they feel need improvement. results are generally consistent across demographic/geographic subgroups.

For U.S. respondents, four airport features receive the most mentions as needing improvement, these are:

* Quick baggage claim
* Ease of changing planes
* Quick and easy check-in
* Short walking distance

Other N.A. respondents concur with the above but frequently add 'rapid customs clearance' as an important feature and one that is in need of improvement.

Table 13

1984 AMERICAN SURVEY RESPONDENTS' EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

| | Named as one of three most important factors in airport evaluation | | Needs improvement | |
|---|---|---|---|---|
| | 1984 | 1981 | 1984 | 1981 |
| Quick baggage claim | 57.4% | 59.6% | 68.6% | 66.8% |
| Ease of changing planes | 52.7 | 42.4 | 49.3 | 45.7 |
| Quick and easy check in | 40.0 | 37.7 | 44.2 | 43.2 |
| Short walking distance | 36.0 | 32.2 | 47.2 | 43.2 |
| Jetways (loading bridges) | 18.5 | 14.1 | 7.5 | 8.0 |
| Rapid customs clearance | 15.3 | 46.6 | 30.3 | 61.0 |
| Moving walkways | 14.3 | 11.7 | 25.4 | 25.4 |
| Comfortable waiting areas/ lounges | 12.5 | 16.6 | 24.8 | 32.2 |
| Nearby parking facility | 12.1 | 1.9 | 27.1 | 12.4 |
| Cleanliness | 11.9 | 10.4 | 26.1 | 23.4 |
| Availability of ground transportation | 9.3 | 7.9 | 16.5 | 12.8 |
| Good security | 9.0 | 8.8 | 11.8 | 11.1 |
| Frequently placed schedule monitors | 5.7 | 4.0 | 14.7 | 17.2 |
| Frequent transportation between terminals | 5.5 | 4.0 | 24.2 | 17.5 |
| Good restaurants | 4.1 | 4.5 | 26.1 | 23.2 |
| International signs/ directions/information | 2.6 | 5.9 | 9.3 | 16.0 |
| News stands | 0.7 | 0.6 | 2.4 | 2.3 |
| Duty-free shops | 0.6 | 3.1 | 2.4 | 9.0 |
| Other | 1.0 | 0.6 | 2.0 | 1.5 |

## PURCHASING DUTY-FREE GOODS
**********

About 40% of the U.S. respondents and half of those living in Other N.A. areas often purchase duty-free goods when taking international trips.

HOW OFTEN 1984 SURVEY RESPONDENTS PURCHASE
DUTY-FREE GOODS ON INTERNATIONAL FLIGHTS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Very often | 19.3% | 27.5% |
| Somewhat often | 19.0 | 25.1 |
| Not very often | 43.5 | 38.3 |
| Not at all | 18.2 | 9.0 |

As it stands now, the vast majority of those who purchase duty-free goods do so when departing for their home city rather than upon arrival in the home city.

WHEN 1984 AMERICAN SURVEY RESPONDENTS
USUALLY PURCHASE DUTY-FREE GOODS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| When departing for home city | 92.3% | 84.8% |
| Upon arrival at home city | 7.7 | 15.2 |

However, almost half of the respondents would like to make their duty-free purchases upon arrival at home instead of at the departure airport, and fewer than one in ten would object to doing so.

1984 AMERICAN SURVEY RESPONDENTS' ATTITUDES TOWARD PURCHASING DUTY-FREE GOODS AT HOME AIRPORT AFTER ARRIVAL

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Like strongly | 33.2% | 37.2% |
| Like somewhat | 12.8 | 12.7 |
| Don't care | 46.8 | 40.2 |
| Object somewhat | 3.3 | 5.2 |
| Object strongly | 3.9 | 4.6 |

**********

HOTEL FACILITIES

**********

## HOTEL/MOTEL USAGE DURING THE PAST TWO YEARS

**********

Over the past two years, the average American survey respondent stayed in a hotel 84.4 nights for business purposes and 21.0 nights for pleasure.

Other N.A. respondents report lower hotel stay frequency for business and higher frequency for pleasure travel than do U.S. respondents.

First and Business Class travellers stay in hotels far more often for business than do economy and discount passengers. In addition, First Class passengers stay in hotels for pleasure more often than average.

Men report higher frequency of hotel stays for business and lower frequency for pleasure trips than do women.

AVERAGE NUMBER OF NIGHTS STAYED IN A HOTEL/MOTEL
DURING THE PAST TWO YEARS FOR:

| Area of Residence: | Business | Pleasure |
|---|---|---|
| U.S. (Total) | 85.2 | 20.5 |
| East | 85.0 | 20.4 |
| South/South Central | 91.3 | 19.7 |
| North Central | 90.8 | 20.1 |
| West | 85.3 | 20.9 |
| Other N.A. Respondents | 74.3 | 26.8 |
| Class Flown: | | |
| First | 100.5 | 25.6 |
| Business | 97.7 | 19.6 |
| Economy | 79.3 | 19.9 |
| Discount | 76.0 | 20.9 |
| Sex | | |
| Male | 86.9 | 20.6 |
| Female | 53.9 | 24.0 |
| Total: | 84.4 | 21.0 |

With regard to the actual hotel chains frequented, the majority (i.e., at least half) of all the respondents report having stayed at these hotel chains during the past two years:

* Holiday Inn
* Hilton Hotels Corporation
* Sheraton
* Hyatt/Hyatt Regency

In addition, at least 50% of the U.S. residents have stayed at a Marriott (62.6%), Best Western (55.7%), and/or Ramada Inn (50.8%), and 53.4% of the Other N.A. respondents have spent a night at a Westin Hotel during the past two years.

No noteworthy differences in hotel/motel patronage occur between the U.S. geographic regions. However, first class travellers patronize the following hotel chains more often than average:

* Hyatt/Hyatt Regency (74.6%)
* Intercontinental (42.8%)
* Four Seasons (32.0%)
* Fairmont (27.3%)

In addition, heavy business travellers (25+ trips during past two years) demonstrate well above average patronage of these chains:

* Holiday Inn (89.0%)
* Hilton Hotels Corporation (88.0%)
* Sheraton (80.8%)
* Hyatt/Hyatt Regency (80.6%)
* Marriott (82.0%)
* Best Western (66.7%)
* Ramada Inns (67.7%)
* Howard Johnson's (51.1%)
* Quality Inns (40.5%)

Table 14

HOTEL CHAINS STAYED IN DURING THE PAST TWO YEARS
BY 1984 AMERICAN RESPONDENTS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Holiday Inns | 78.8% | 75.2% |
| Hilton | 73.1 | 68.5 |
| Sheraton | 64.2 | 64.5 |
| Hyatt/Hyatt Regency | 62.9 | 59.4 |
| Marriott | 62.6 | 45.2 |
| Best Western | 55.7 | 39.3 |
| Ramada Inns | 50.8 | 32.9 |
| Westin | 40.9 | 53.4 |
| Howard Johnson's | 37.0 | 23.9 |
| Quality Inns | 30.4 | 16.6 |
| Inter-Continental | 25.6 | 39.9 |
| Radisson | 21.0 | 5.8 |
| Days Inn | 20.3 | 7.4 |
| La Quinta Motor Inns | 18.1 | 11.2 |
| Four Seasons | 18.0 | 30.4 |
| Amfac | 17.9 | 8.5 |
| Travelodge | 17.2 | 11.1 |
| Fairmont | 16.6 | 8.2 |
| Stouffer | 16.1 | 8.0 |
| Americana | 16.0 | 19.7 |
| Rodeway Inns | 15.6 | 8.5 |
| Omni Dunfey | 12.8 | 4.9 |
| Red Lion | 12.6 | 4.4 |
| Trusthouse Forte | 11.4 | 14.6 |
| Granada Royle | 11.4 | 4.9 |
| Harley | 10.9 | 5.5 |
| Doubletree | 10.0 | 4.9 |
| Red Carpet Inns | 8.6 | 3.2 |
| Meridien | 8.0 | 18.2 |
| Loews | 7.9 | 8.6 |
| Friendship Inns | 6.0 | 3.6 |
| Canadian Pacific | 5.3 | 23.2 |
| Crowne Plaza | 5.0 | 1.2 |
| Preferred | 4.9 | 3.6 |
| Princess | 4.9 | 12.2 |
| Penta | 4.1 | 7.2 |
| Oberoi | 2.3 | 5.4 |
| Sheffield | 1.1 | 0.8 |
| Wandlyn Inns | 0.6 | 3.9 |
| Other | 5.8 | 9.2 |

## HOTEL PRICES
**********

On average, 1984 respondents currently spend $70.20 per night for business lodgings and $68.90 for pleasure accommodation. U.S. travellers spend substantially less for accommodation than do Other N.A. respondents. In addition, hotel expenditures show a strong positive correlation to the airline class generally flown.

AVERAGE HOTEL ROOM EXPENDITURE PER NIGHT FOR:

| | Business | Pleasure |
|---|---|---|
| Area of residence: | | |
| U.S. (Total) | $69.50 | $68.30 |
| East | 72.80 | 71.50 |
| South/South Central | 67.30 | 66.90 |
| North Central | 65.30 | 63.20 |
| West | 69.50 | 67.20 |
| Other N.A. | 79.10 | 76.20 |
| Class flown: | | |
| First | 90.20 | 94.30 |
| Business | 77.60 | 74.40 |
| Economy | 65.90 | 64.40 |
| Discount | 63.10 | 61.40 |
| Total | 70.20 | 68.90 |

Regardless of demographic/geographic group, about 80% of the current American survey respondents find hotel prices to be expensive; hardly anyone thinks that lodgings are inexpensive.

PERCEIVED EXPENSE OF HOTEL COSTS

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Very expensive | 30.3% | 25.1% |
| Somewhat expensive | 52.1 | 52.2 |
| Approximately as expected | 16.9 | 22.4 |
| Somewhat inexpensive | 0.5 | 0.4 |
| Very inexpensive | 0.1 | 0.1 |

## SELECTION OF HOTEL ACCOMMODATION

**********

Regardless of demographic/geographic group, the vast majority of American respondents select their own hotel accommodation.

WHO SPECIFIES THE HOTEL/MOTEL USED FOR:

| | Business | | Pleasure | |
|---|---|---|---|---|
| | U.S. Respondents | Other N.A. Respondents | U.S. Respondents | Other N.A. Respondents |
| Self | 86.4% | 87.2% | 94.0% | 93.3% |
| Travel agent | 3.7 | 3.6 | 5.2 | 5.4 |
| Business associate at destination | 3.1 | 1.7 | 0.1 | 0.1 |
| Dictated by company policy | 2.7 | 2.1 | 0.1 | --- |
| Company travel department | 2.2 | 3.0 | 0.1 | --- |
| Secretary | 2.0 | 2.4 | 0.5 | 1.2 |

Except where noted, 1984 American respondents agree upon the relative importance of several factors in the selection of hotel/motel accommodations, as follows:

IMPORTANT FACTORS CONSIDERED IN CHOOSING A HOTEL

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Location | 88.8% | 90.8% |
| Past experience | 68.5 | 71.4 |
| Low price [1] | 29.6 | 24.4 |
| Special services/amenities [2] | 21.9 | 21.2 |
| Corporate rate availability | 20.6 | 19.0 |
| Airport shuttle availability | 17.7 | 15.2 |
| IAPA discount | 11.7 | 23.9 |
| Frequent-flyer program tie-in | 7.7 | 3.2 |
| Choice of smoking/non-smoking accommodations | 6.7 | 5.7 |
| Meeting/convention facilities | 5.9 | 2.8 |
| Executive floor/ suites availability [3] | 5.3 | 5.2 |
| Other | 6.4 | 8.7 |

1 Class Flown

| First | Business | Economy | Discount |
|---|---|---|---|
| 9.2% | 16.2% | 30.7% | 42.6% |

2 37.2% for first class travellers

3 18.4% for first class travellers

## TYPE OF HOTEL ACCOMMODATIONS USED

**********

For business travel about half (48.0%) of this year's American respondents stay in superior accommodations (deluxe is top accommodation) and an additional one-third (38.6%) use intermediate lodgings. About one in in ten (9.2%) stay in deluxe hotels/motels. Fewer than 5% stay at economy establishments when travelling for business. Other N.A. residents are somewhat more attracted to deluxe and superior lodgings for business travel than are U.S. respondents. In addition, there is a strong positive correlation between the class most frequently flown and the levels of hotel accommodation used most often.

For pleasure travel, most travellers are apt to choose superior (37.1%) or intermediate (39.1%) hotels, while 13.3% usually stay at deluxe establishments and 10.5% choose some type of economy lodging. These statistics are highly consistent across the geographic subgroups, but do show strong positive correlation to the airline class generally flown.

## TYPE OF LODGING USED MOST OFTEN

### For business

| | Deluxe | Superior | Intermediate | Economy | Super Economy |
|---|---|---|---|---|---|
| **Area of residence:** | | | | | |
| U.S. (Total) | 8.7% | 47.5% | 39.5% | 3.6% | 0.7% |
| East | 10.0 | 50.0 | 36.2 | 2.8 | 0.9 |
| South/South Central | 8.0 | 45.4 | 42.2 | 4.0 | 0.4 |
| North Central | 5.5 | 44.7 | 44.8 | 4.6 | 0.5 |
| West | 9.1 | 48.6 | 38.5 | 3.1 | 0.7 |
| Other N.A. | 15.3 | 53.9 | 28.5 | 1.6 | 0.8 |
| **Class flown:** | | | | | |
| First | 30.0 | 55.7 | 13.2 | 0.4 | 0.1 |
| Business | 11.8 | 57.6 | 29.7 | 0.8 | 0.2 |
| Economy | 4.3 | 45.9 | 45.8 | 3.4 | 0.6 |
| Discount | 5.5 | 43.0 | 44.1 | 6.1 | 1.4 |
| **Total** | 9.2 | 48.0 | 38.6 | 3.5 | 0.7 |

### For pleasure

| | Deluxe | Superior | Intermediate | Economy | Super Economy |
|---|---|---|---|---|---|
| **Area of residence:** | | | | | |
| U.S. (Total) | 13.1% | 37.0% | 39.3% | 9.1% | 1.6% |
| East | 15.4 | 37.8 | 36.6 | 8.4 | 1.9 |
| South/South Central | 11.7 | 36.7 | 42.0 | 8.6 | 1.0 |
| North Central | 8.6 | 33.5 | 44.9 | 11.5 | 1.6 |
| West | 12.7 | 38.1 | 38.3 | 9.7 | 1.3 |
| Other N.A. | 16.0 | 37.5 | 37.5 | 6.2 | 2.7 |
| **Class flown** | | | | | |
| First | 35.5 | 44.1 | 17.6 | 2.3 | 0.6 |
| Business | 15.5 | 44.4 | 35.2 | 4.3 | 0.6 |
| Economy | 8.6 | 35.7 | 45.0 | 9.0 | 1.6 |
| Discount | 8.9 | 32.7 | 42.1 | 13.5 | 2.8 |
| **Total** | 13.3 | 37.1 | 39.1 | 8.8 | 1.7 |

## EVALUATION OF HOTEL CHAINS

Favorite hotel chain

With generally consistent findings in the subgroups, 1984 American respondents name the following hotel chains as their favorites. (Major differences are noted.)

FAVORITE HOTEL CHAINS
(Top ten)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Hyatt/Hyatt Regency | 19.1% | Westin | 17.4% |
| Marriott [1] | 15.4 | Hyatt/Hyatt Regency | 17.2 |
| Holiday Inn | 12.7 | Four Seasons | 10.9 |
| Westin | 8.5 | Sheraton | 8.2 |
| Hilton Hotels Corporation | 7.4 | Hilton Hotels Corporation | 7.8 |
| Sheraton | 5.9 | Marriott | 7.6 |
| Four Seasons [2] | 4.9 | Inter-Continental | 7.4 |
| Best Western | 4.6 | Holiday Inn | 6.9 |
| Inter-Continental | 3.5 | Best Western | 2.0 |
| Granada Royale | 2.1 | Canadian Pacific | 2.0 |

1. 4.4% for first class travellers
2. 11.8% for first class travellers

## Hotel chain with the best service

Respondents generally agree that the hotel chains below offer the best service.

HOTEL CHAINS WITH THE BEST SERVICE
(Top ten)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Hyatt/Hyatt Regency | 21.0% | Hyatt/Hyatt Regency | 17.7% |
| Marriott | 16.7 | Westin | 17.0 |
| Westin | 9.5 | Four Seasons | 13.5 |
| Hilton Hotels Corporation | 8.4 | Marriott | 9.0 |
| Holiday Inns [1] | 8.2 | Hilton Hotels Corporation | 8.8 |
| Four Seasons [2] | 5.6 | Sheraton | 8.1 |
| Sheraton | 5.2 | Inter Continental | 6.7 |
| Inter Continental | 3.8 | Holiday Inn | 4.3 |
| Best Western | 2.9 | Canadian Pacific | 2.9 |
| Fairmont | 2.3 | Best Western | 1.6 |

1. 2.8% for first class travellers
2. 12.4% for first class travellers

## Hotel Chain with the poorest service

The hotel chain with the most common reputation for poor service is Holiday Inn, as shown below:

HOTELS CHAINS WITH THE POOREST SERVICE
(Top ten)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Holiday Inn | 23.4% | Holiday Inn | 31.5% |
| Howard Johnson's | 11.9 | Hilton Hotels Corporation | 9.4 |
| Ramada Inns | 9.9 | Sheraton | 8.2 |
| Hilton Hotels Corporation | 8.3 | Ramada Inns | 6.8 |
| Days Inn | 7.9 | Howard Johnson's | 6.5 |
| Sheraton | 7.6 | Days Inn | 4.6 |
| Best Western | 4.7 | Best Western | 4.4 |
| Travelodge | 4.2 | Travelodge | 3.1 |
| Quality Inns | 3.8 | Marriott | 3.1 |
| Marriott | 2.5 | Inter Continental | 2.9 |

## Hotel chains with the best facilities

Consistent with their choices for favourite hotel and best services, American respondents feel that the following hotel chains offer the best facilities.

HOTEL CHAINS WITH THE BEST FACILITIES
(Top ten)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Hyatt/Hyatt Regency | 26.1% | Hyatt/Hyatt Regency | 18.2% |
| Marriott | 15.6 | Westin | 17.0 |
| Westin | 9.8 | Four Seasons | 10.0 |
| Hilton Hotels Corporation | 8.2 | Hilton Hotels Corporation | 9.6 |
| Four Seasons * | 5.9 | Marriott | 8.8 |
| Sheraton | 5.8 | Sheraton | 8.8 |
| Holiday Inn | 5.4 | Inter Continental | 6.2 |
| Inter Continental | 3.5 | Holiday Inn | 4.2 |
| Granada Royale | 2.4 | Canadian Pacific | 2.2 |
| Fairmont | 2.1 | Princess | 2.0 |

* 12.1% for first class travellers

## Hotel chains with the poorest facilities

As with service, Holiday Inn is the hotel chain most frequently named as providing the poorest facilities.

HOTEL CHAINS WITH THE POOREST FACILITIES
(Top ten)

| U.S. respondents | | Other N.A. respondents | |
|---|---|---|---|
| Holiday Inn | 21.1% | Holiday Inn | 26.8% |
| Howard Johnson's | 12.1 | Ramada Inns | 7.8 |
| Ramada Inns | 11.2 | Best Western | 7.8 |
| Days Inn | 11.0 | Howard Johnson's | 6.5 |
| Travelodge | 6.9 | Days Inn | 6.5 |
| Best Western | 6.5 | Sheraton | 5.7 |
| Sheraton | 5.2 | Hilton Hotels Corporation | 5.7 |
| Quality Inns | 5.1 | Quality Inns | 4.7 |
| Hilton Hotels Corporation | 4.1 | Travelodge | 4.4 |
| Rodeway Inns | 2.9 | La Quinta Motor Inns | 3.4 |

## HOTEL ROOMS FOR SMOKERS AND NON-SMOKERS
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Overall, slightly over half of the 1984 respondents favor separate hotel rooms for smokers and non-smokers, while about one in three is indifferent to this idea and fewer than one in ten oppose it. Women are especially strong advocates of hotels offering rooms for smokers and non-smokers.

FEELINGS ABOUT HOTELS THAT PROVIDE ROOMS
FOR SMOKERS AND NON-SMOKERS

| | U.S. respondents | Other N.A. respondents | Sex | |
|---|---|---|---|---|
| | | | Male | Female |
| Strongly in favour | 46.1% | 42.4% | 44.9% | 55.3% |
| Somewhat in favour | 11.6 | 11.1 | 11.6 | 10.6 |
| Makes no difference | 35.7 | 39.4 | 36.6 | 29.2 |
| Somewhat opposed | 1.7 | 1.6 | 1.8 | 0.8 |
| Strongly opposed | 5.0 | 5.6 | 5.1 | 4.1 |

**********

CAR RENTAL COMPANIES

**********

## RENTAL CAR USAGE DURING THE PAST TWO YEARS

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Men and first class passengers show especially high levels of rental car usage. U.S. respondents are far more likely to rent cars for business travel than are Other N.A. respondents.

AVERAGE NUMBER OF TIMES RENTED A CAR DURING THE PAST TWO YEARS

| | | Sex | | Class flown | | | | Country of residence | |
|---|---|---|---|---|---|---|---|---|---|
| | Total | Male | Female | 1st | Bus-iness | Econ-omy | Dis-count | U.S. | Other N.A. |
| Business | 22.0 | 23.0 | 9.7 | 27.9 | 23.4 | 21.4 | 19.7 | 22.6 | 15.0 |
| Pleasure | 3.8 | 3.9 | 2.8 | 5.2 | 4.0 | 3.4 | 3.9 | 3.8 | 4.5 |

Statistics for the actual car rental agencies used are generally similar to those in 1981, although Alamo has gained a significant market share over the past two years. The North American rental car market is still dominated by Hertz and Avis, and Budget and National, to a lesser degree.

RENTAL CAR AGENCIES USED DURING THE PAST TWO YEARS

| | U.S. Respondents | | | Other N.A. Respondents | | |
|---|---|---|---|---|---|---|
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| Hertz | 78.2% | 72.8% | 80.3% | 79.4% | 73.6% | 79.2% |
| Avis | 72.1 | 65.8 | 79.0 | 78.2 | 73.0 | 81.3 |
| Budget | 63.6 | 54.7 | 61.5 | 64.3 | 63.0 | 55.8 |
| National | 60.2 | 53.9 | 64.3 | 58.4 | 42.5 | 45.6 |
| Dollar | 21.9 | 18.7 | 22.2 | 20.1 | 15.9 | 21.4 |
| Alamo | 17.4 | --- | --- | 10.1 | --- | --- |
| Thrifty | 12.8 | 10.1 | --- | 8.7 | 6.9 | --- |
| American Int'l | 11.5 | 13.2 | 12.9 | 4.5 | 3.9 | 6.3 |
| Ajax | 5.3 | --- | --- | 3.1 | --- | --- |
| General | 5.1 | --- | --- | 6.0 | --- | --- |
| Showcase | 0.3 | --- | --- | --- | --- | --- |

The above 1984 findings are consistent across demographic/geographic subgroups.

## SELECTION OF A CAR RENTAL COMPANY

Regardless of demographic/geographic group, the vast majority of 1984 American respondents generally choose their rental car agency themselves when travelling for business and pleasure - although a travel agent agent may actually book the reservation.

WHO CHOOSES RENTAL CAR COMPANY

| | For business | | For pleasure | |
|---|---|---|---|---|
| | U.S. respondents | Other N.A. respondents | U.S. respondents | Other N.A. respondents |
| Self | 84.8% | 88.8% | 94.6% | 94.6% |
| Dictated by company policy | 5.7 | 3.0 | 0.2 | ---- |
| Travel agent | 4.0 | 3.0 | 3.9 | 3.5 |
| Secretary | 2.6 | 2.9 | 1.0 | 1.6 |
| Company travel department | 2.6 | 2.0 | 0.2 | 0.2 |
| Business associate at destination | 0.4 | 0.2 | 0.1 | 0.2 |

Overall, the two most important factors in selection of a rental car company are on-airport location and low price. The on-airport location is far more important for first and business class travellers, while low price is substantially more important for discount passengers. IAPA discounts are substantially more important to Other N.A. respondents than to U.S. respondents.

The most important factors in choosing a car rental agency, in order of rank, are as follows:

THE THREE MOST IMPORTANT FACTORS IN 1984 SURVEY RESPONDENTS' CHOICE OF A CAR RENTAL AGENCY

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| On-airport location | 56.3% | 61.8% |
| Low price | 49.9 | 43.2 |
| Condition of cars | 35.8 | 41.4 |
| Fast pick-up and delivery service | 35.7 | 31.7 |
| Types of cars available | 22.1 | 25.1 |
| Guaranteed reservations | 21.4 | 16.7 |
| Express check-in/check-out | 20.2 | 19.3 |
| Corporate rate availability | 20.0 | 12.2 |
| IAPA discount | 18.4 | 35.4 |
| Courteous service | 14.4 | 15.6 |
| Frequent renter programs | 5.9 | 20.2 |
| Off-airport locations | 1.8 | 1.8 |
| Other | 1.5 | 1.5 |

| Class flown | | | |
|---|---|---|---|
| 1st | Business | Economy | Discount |
| 62.8 | 62.8 | 58.1 | 47.2 |

| Class flown | | | |
|---|---|---|---|
| 1st | Business | Economy | Discount |
| 25.9 | 34.7 | 48.4 | 69.0 |

## EVALUATION OF CAR RENTAL AGENCIES

### Overall service

1984 respondents name Hertz as the car rental company with the best overall service, and Avis is in second place. This represents an improvement for Hertz' standing versus Avis among Other N.A. respondents in 1981 and 1979.

RENTAL CAR AGENCY PREFERENCE

| | U.S. respondents | | | Other N.A. respondents | | |
|---|---|---|---|---|---|---|
| | Best service overall | Most preferred agency | | Best service overall | Most preferred agency | |
| | 1984 | 1981 | 1979 | 1984 | 1981 | 1979 |
| Hertz | 37.3% | 30.7% | 29.0% | 38.7% | 28.8% | 30.5% |
| Avis | 23.1 | 20.8 | 27.8 | 31.3 | 29.6 | 39.7 |
| National | 18.4 | 21.4 | 22.7 | 13.3 | 9.8 | 14.0 |
| Budget | 13.6 | 16.8 | 15.5 | 11.9 | 23.9 | 12.1 |
| Alamo | 2.1 | ---- | ---- | 1.3 | ---- | ---- |
| Dollar | 1.3 | 2.5 | 2.0 | 0.9 | 1.4 | 2.9 |
| American Int'l | 1.3 | 2.7 | 2.2 | 0.5 | ---- | ---- |
| Thrifty | 1.1 | 2.0 | ---- | 0.4 | ---- | ---- |
| Ajax | 0.7 | ---- | ---- | 0.4 | ---- | ---- |
| General | 0.5 | ---- | ---- | 0.5 | ---- | ---- |
| Other | 0.6 | 2.6 | ---- | 0.9 | 5.1 | 0.8 |

About 40% of this year's U.S. respondents name either Hertz (19.9%) or Budget (19.6%) as the car rental agency with the poorest service overall. Other N.A. respondents designate Budget as the rental car company with the poorest service overall, with Avis, Hertz and National all coming close behind. Comparisons with earlier results are deceptive, as price was included in the 1981 respondents' selection of least preferred agency, whereas in 1984 price is considered separately.

RENTAL CAR AGENCY AVOIDANCE

| | Poorest service overall | |
|---|---|---|
| | U.S. respondents | Other N.A. respondents |
| | 1984 | 1984 |
| Hertz | 19.9% | 15.8% |
| Budget | 19.6 | 23.1 |
| Avis | 15.0 | 16.3 |
| National | 11.7 | 15.2 |
| Alamo | 9.6 | 7.9 |
| Dollar | 7.8 | 9.0 |
| Thrifty | 6.2 | 5.4 |
| American International | 4.5 | 1.6 |
| Ajax | 2.4 | 0.5 |
| General | 1.9 | 3.0 |
| Other | 1.4 | 2.1 |

Overall service evaluation for the rental car agencies is consistent across demographic/geographic subgroups.

Prices
======

With a high degree of consistency in all subgroups, three quarters of the respondents identify Hertz as the car rental company with the highest prices.

CAR RENTAL COMPANY WITH THE HIGHEST PRICE

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Hertz | 75.9% | 76.3% |
| Avis | 14.1 | 13.4 |
| National | 4.7 | 4.5 |
| General | 1.8 | 1.1 |
| Budget | 1.6 | 2.5 |
| American International | 0.4 | 0.2 |
| Dollar | 0.3 | 0.9 |
| Alamo | 0.3 | --- |
| Ajax | 0.2 | 0.4 |
| Thrifty | 0.2 | 0.2 |
| Other | 0.5 | 0.4 |

More than one-third of the American respondents think that Budget has lower prices than its competitors, while one in four names either Alamo or National as the company with the lowest prices. Again, these results are stable across demographic/geographic groups.

CAR RENTAL COMPANY WITH THE LOWEST PRICES

| | U.S. respondents | Other N.A. respondents |
|---|---|---|
| Budget | 35.0% | 35.9% |
| Alamo | 13.6 | 7.3 |
| National | 11.0 | 17.3 |
| Dollar | 8.7 | 9.9 |
| Thrifty | 8.0 | 7.6 |
| Avis | 6.7 | 7.6 |
| American Int'l | 4.9 | 1.4 |
| Hertz | 3.7 | 5.9 |
| Ajax | 3.0 | 1.7 |
| General | 2.0 | 2.1 |
| Other | 3.4 | 3.3 |

## RENTAL CARS FOR SMOKERS AND NON-SMOKERS

**********

Almost half of this year's American respondents indicate that they favor the idea of separate rental cars for smokers and non-smokers, while about 40% are indifferent to this idea. Very few respondents oppose the concept of rental cars for smokers and non-smokers.

### FEELINGS ABOUT COMPANIES THAT PROVIDE RENTAL CARS FOR SMOKERS AND NON-SMOKERS

| | U.S respondents | Other N.A respondents |
|---|---|---|
| Strongly in favor | 42.2% | 39.7% |
| Somewhat in favor | 11.3 | 8.8 |
| Makes no difference | 40.0 | 44.3 |
| Somewhat opposed | 1.7 | 1.7 |
| Strongly opposed | 4.9 | 5.5 |